

# **BSBHRM405**

# **Support the recruitment, selection and induction of staff**

**Release 1**

**Learner guide**

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selection and  
induction of staff**

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Aspire Version 1.1

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BSBHRM405 Support the recruitment, selection and induction of staff Release 1

© 2017 Aspire Training & Consulting  
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First published April 2017

Cover design: Rewind Creative  
Printer: Doculink Australia Pty Ltd, 1d/28 Rogers Street, Port Melbourne VIC 3207

e-ISBN 978-1-76059-372-8 (PDF version)  
ISBN 978-1-76059-371-1

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# Before you begin

This learner guide is based on the unit of competency *BSBHRM405 Support the recruitment, selection and induction of staff*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: [www.training.gov.au](http://www.training.gov.au).

## How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: <a href="http://www.aspirelr.com.au/help">www.aspirelr.com.au/help</a>
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.



## Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> <li>• Synthesises ideas, concepts and specific information from workplace and regulatory texts to inform development of workplace documents</li> <li>• Evaluates information to make judgements</li> </ul>
Writing	<ul style="list-style-type: none"> <li>• Produces a range of text types using specific information, workplace conventions and templates</li> </ul>
Oral communication	<ul style="list-style-type: none"> <li>• Asks questions and listens carefully to gather, interpret or evaluate information</li> <li>• Uses appropriate vocabulary to present ideas or persuasive arguments</li> </ul>
Navigate the world of work	<ul style="list-style-type: none"> <li>• Applies workplace protocols, legislation or regulations relevant to own responsibilities</li> </ul>
Interact with others	<ul style="list-style-type: none"> <li>• Selects and uses appropriate conventions and protocols when communicating with personnel, candidates or referees</li> <li>• Participates in conversations relevant to role responding, explaining, negotiating and persuading as required</li> </ul>
Get the work done	<ul style="list-style-type: none"> <li>• Selects and uses digital technology to access, enter, store and retrieve information in accordance with security requirements</li> <li>• Takes responsibility for planning and implementing tasks for efficient and effective outcomes</li> </ul>

## What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Plan for recruitment	1A Obtain approval to fill the position and clarify appointment time lines and requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Assist with preparing the job description	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Consult with relevant personnel about the job description and workforce strategy	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Assist in ensuring job descriptions comply with legislative and organisation requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1E Obtain approval to advertise the position	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Plan for selection	2A Choose appropriate channels and technology to advertise a position	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Advertise vacancies	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Consult with relevant personnel to convene a selection panel and develop interview questions	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Assist in ensuring that interview questions comply with legislative requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2E Assist in short-listing applicants	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2F Schedule interviews	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3 Support the selection process	3A Participate in the interview process and assess candidates against agreed selection criteria	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Discuss assessment with the other selection panel members	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Correct biases and deviations from agreed procedures and negotiate a preferred candidate	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3D Contact referees for referee reports	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3E Prepare a selection report and make recommendations to senior personnel for appointment	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3F Advise unsuccessful candidates of the outcome and respond to any queries	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3G Secure the preferred candidate's agreement	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3H Complete all necessary documentation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4 Induct the successful candidate	4A Provide the successful candidate with an employment contract and other documentation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4B Advise the manager and work team of the new appointment	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4C Make necessary administrative arrangements for the new employee	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4D Arrange the successful candidate's induction	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

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# Topic 1

## Plan for recruitment

Recruiting the right people to fill roles in an organisation is a crucial task. The recruitment process must be done according to legislative and organisational requirements, and to a strict time line.

The first stage of the recruitment process is identifying a job vacancy for which a job description needs to be developed and advertised to attract applicants. The job description communicates the duties and responsibilities of the person holding the job and is used in the employment contract and performance appraisals.

This topic looks at what makes a good job description, including how to conduct a job analysis to find out vital information about the job holder's duties and responsibilities, and how to communicate accurate information by consulting with relevant people and working with organisational policies and procedures.

In this topic you will learn how to:

- 1A Obtain approval to fill the position and clarify appointment time lines and requirements
- 1B Assist with preparing the job description
- 1C Consult with relevant personnel about the job description and workforce strategy
- 1D Assist in ensuring job descriptions comply with legislative and organisation requirements
- 1E Obtain approval to advertise the position

# 1A

## Obtain approval to fill the position and clarify appointment time lines and requirements

Human resource management involves managing an organisation's employees. The aim of the human resources (HR) department is to ensure that the organisation's human resources can help it achieve its goals.

The most essential skills required for this area of work are communication, literacy and organisation skills. The recruitment and selection process relies on your ability to elicit specific information from candidates by using a variety of interviewing techniques, asking open questions, actively listening to responses and expressing yourself clearly. You also need to effectively arrange various activities and coordinate the many people involved in the recruitment and selection process.



A good knowledge of the employee life cycle and how recruitment and selection fit into this cycle is important. You need to know the key stages of this process, such as advertising job descriptions, conducting job interviews and assessing candidates.

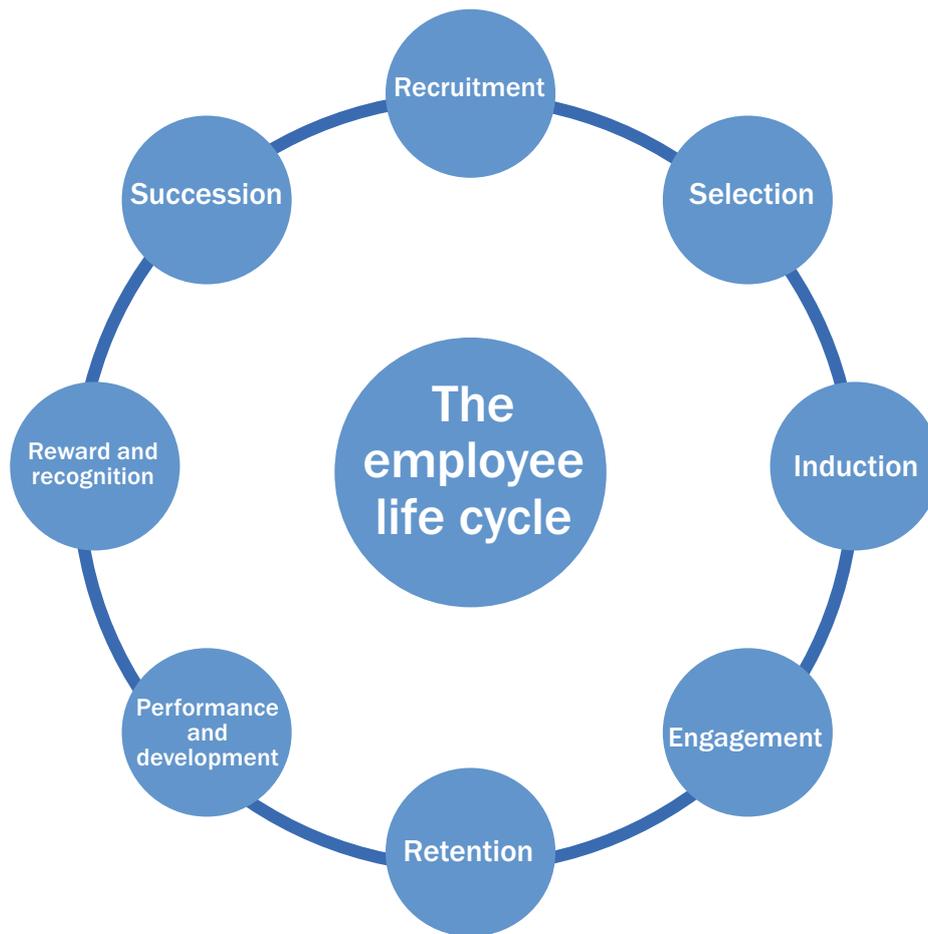
It is also important that you have a good working knowledge of the principles of equity and diversity, as well as the workplace legislation applicable in your state or territory.

### The employee life cycle

The employee life cycle, also known as the human resource cycle, is a model that identifies stages in an employee's career to help guide their management. Recruitment, selection and induction are the first steps of the employee life cycle and are central tasks for the HR department.

The employee life cycle tool is used to encourage employee performance, maintain staff motivation levels and ensure the organisation invests in the development of its individual employees. The HR manager uses this to determine the resources to be invested in an employee, according to the stage the employee has reached in the cycle. For example, the organisation will invest money in induction programs for new employees, and may invest in suitable training programs to develop and up-skill staff who have been with the organisation for a longer period.

Here is a diagram that shows the stages involved in the employee life cycle from recruitment through to succession.



## The recruitment process

The recruitment process requires careful consideration of the role and the organisation's needs. Here are several aspects of the recruitment process.

### Preparing the job description

The job description is central to the recruitment and selection process. It is used to advertise a job and attract applicants. Preparing a good job description requires you to conduct a job analysis by gathering essential information about the job from various sources, including colleagues and managers.

### Advertising the job

A job can be advertised internally (within the organisation to current employees) and externally (to potential applicants outside of the organisation). Jobs can be advertised in many places, including in newspapers, on the organisational intranet and on online job boards.

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### **The selection process**

The objective of the selection process is to assess applicants based on the key selection criteria for the job. Convening a selection panel is one of the first steps in the selection process. The panel is responsible for assessing incoming applications, conducting job interviews and deciding on a preferred candidate.

### **Conducting job interviews**

The strongest applicants are short-listed and invited to attend a job interview. Job interviews are the most important selection tool, because they provide an opportunity to gather a lot of information about each candidate. The selection panel asks questions to gather more information about the candidates' skills, abilities and work experience.

### **Assessing and selecting applicants**

To verify the information provided in the interview, a member of the selection panel must check the preferred candidate's references. This involves contacting each referee and asking questions about the candidate's past work performance. The outcomes of the referee check are shared with the other panel members and discussed when deciding on the preferred candidate for the position.

### **Appointing and inducting the successful candidate**

When a new employee joins an organisation, a number of administrative tasks need to be completed, including arranging a workspace, completing the necessary paperwork and organising an induction program. The purpose of an induction is to welcome and orientate the new employee into the organisation and encourage their retention and performance.

## **Plan the recruitment process**

The process of recruiting new employees takes time, as it involves several stages. A well-planned and prepared recruitment process helps attract a better pool of applicants for the job and saves time and resources.

The recruitment process varies depending on the type of organisation and the type of job vacancy. For example, the organisation may need to recruit one new employee or fill multiple positions. Find out the level of the appointment, the skill set for the position and whether there is flexibility in the types of applicants the recruitment process should attract.

Establishing the expectations, requirements and time lines for recruiting, even before you begin developing the job description, requires an understanding of the recruitment process.

### Typical questions to ask when planning

- How many positions need to be filled?
- Why does the organisation need to appoint someone to this position?
- In which department or business area is the appointment?
- What salary (or remuneration package) will be offered?
- What are the organisational requirements for this appointment?
- Who in the organisation needs to approve the position?
- What type of position is it?
- What recruitment strategy will be used?
- What is the time line for the appointment?
- Who will organise and manage the recruitment process?

## Documentation

The recruitment process often begins with the HR department receiving requisitions for recruitment from other areas of the organisation. A requisition is a formal written request to recruit a new employee. The requisition contains information about the position, the starting date, the duties and the qualifications that candidates need. Without approval from management to fill the position, the recruitment process cannot continue.

Completing and maintaining documents is an essential part of the recruitment process. Some large organisations are constantly recruiting, so it is important that you keep documentation up to date and organised.

Here is a list of recruitment forms and documents:

- Requisitions of vacancies
- Job descriptions
- Applications for advertising
- Job applications
- Interview guidance documents
- Interview evaluation documents
- Employment offer documents
- Employment contract documents

## Time lines

Coming up with a time line and schedule of activities is an essential part of recruitment planning. The time line should begin when a vacancy is identified.

The requirements, strategy and process for recruitment will vary from organisation to organisation. For example, a motor vehicle factory that has job vacancies on the production line will recruit differently to a university looking for a professor in physics. The complete recruitment time lines will change to accommodate these requirements, so you need to be flexible.



## Recruitment activities

The time lines include various stages of activities, from receiving the appointment requirements through to signing the employment contract. Scheduling these activities so each is completed by the designated date can be challenging. The more organised and prepared you are, the more smoothly the recruitment process will run. Coordinate dates and times with the members of the selection panel. Determine the designated date for each stage. For example, consider the period for accepting applications, when the selection panel will be available to conduct interviews and the number of candidates to be interviewed.

Here are some of the activities on recruitment time lines:

- Identifying the vacancy
- Receiving information about the appointment requirements
- Obtaining approval to fill the position
- Writing the job description
- Advertising the job description
- Receiving applications
- Selecting (short-listing) applicants for interviews
- Interviewing the short-listed candidates
- Assessing the interviewees and selecting the successful candidate
- Informing the candidates (successful and unsuccessful)
- Determining the new employee's start date
- Signing the employment contract

### Example: the time line for recruitment process and activities

Max is the managing director of a company that manufactures tractors. The operations manager has just submitted his resignation, and Max is eager to get the recruitment process up and running to fill this position. He draws up the following recruitment time line.

Activity	Time allowance	Completion date
Plan recruitment	1 week	1 June
Develop job description	1 week	8 June
Advertise position, including application period and closing date	2 weeks	22 June
Acknowledge applications (usually by email)	Within 1 week of application closing date	29 June
Short-list candidates	Within 1–2 weeks of acknowledging applications	6–13 July
Conduct candidate interviews and testing	2 days	17 July
Carry out referee checks for the preferred candidate (usually by phone)	Immediately following interview and up to 3 days	19 July

*continued ...*

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Activity	Time allowance	Completion date
Make a verbal offer and negotiate the contract details	1 week	26 July
Notify the unsuccessful candidates	As soon as possible after interview	26 July
Submit the signed appointment form to HR department	2-5 days	2 Aug
Time from receipt of the appointment form to issue of the contract	1 week	9 Aug
Time line for candidate to accept the contract	Up to 2 weeks	23 Aug
Total (from start to acceptance)		12 weeks

## Practice task 1

1. Explain the employee life cycle.

2. Find examples of job descriptions using the internet. Compare these to the existing job descriptions at your workplace, or to each other. What are the common main sections?

3. Why is it important to plan the recruitment process? What are the most challenging aspects of working to a recruitment time line?

# 1B

## Assist with preparing the job description

A job description is a written statement that defines the essential tasks, functions and responsibilities of a vacant position. It is used to advertise the position and attract applicants. Information in the job description generally includes the qualifications required, the working conditions and the relationship of the position to others within the organisation.

When assisting in the preparation of job descriptions, it is important to make sure they adhere to organisational policies and procedures, legislation, codes, national standards and work health and safety (WHS) considerations.

A job description:

- provides essential information about the job to potential applicants
- explains the desired attributes
- serves as a foundation on which the legally binding contract of employment is developed
- defines where the job is positioned in the organisation's structure and the reporting hierarchy
- clarifies the critical nature of the job and sets the objectives and expectations of the job role for performance appraisals
- helps the recruitment team to select the right candidate for the job.

### Job analysis

A job analysis helps you understand the competencies and skills required to accomplish job tasks. It provides an insight into how the job fits into the organisation and supports the organisation to reach its overall goals. It also helps you develop a thorough understanding of the various attributes of the position.

Many different methods may be used to gather this type of information, including questionnaires, task inventories, work logs and direct observation. You may conduct interviews with people already employed in the job role or people in positions around the role, such as managers or colleagues.

Here are several things that a job analysis needs to cover.

#### Things covered by a job analysis

The reason the job exists – its relationship to other positions or goals of the organisation

The tasks involved in the job – mental and physical

How the job is done – the methods and equipment to be used

The competencies needed to do the job – training, qualifications, skills, knowledge and personal characteristics

## Elements of a job description

A job description consists of a number of elements that each serve a purpose. Not all job descriptions include these elements; this depends on the organisation's policies, the type of job and the advertising space allocated. Here are some important elements of a job description.

### Elements of a job description

1

#### Job title and purpose of position

Succinctly summarises the job role. The job title should accurately reflect the duties of the job.

2

#### Department or section of the job

A reference to the department or business area the position is part of.

3

#### Summary of the organisation

Briefly describes the organisation. This may include a reference to company culture and/or career progression.

4

#### Job objective

States the general nature, level, purpose and objective of the job. The summary should describe the broad functions and scope of the position.

5

#### Relationship to other positions

Describes the relationship the position has to other roles and functions within the company. This often includes an indication of who the job holder reports to and who reports to the position. It may also include other significant relationships like working teams.

6

#### Key duties and responsibilities

This may be a list of principal duties, continuing responsibilities and accountabilities of the job holder that are critical to the successful performance of the job. It should begin with the most important functional and relational responsibilities and continue in order of decreasing significance.

7

**Working conditions**

Describes the conditions under which the job will be performed and supervised. This could include aspects such as salary and benefits, working hours, overtime requirements, work locations, equipment or machinery to be used, interaction with other positions or working environment and atmosphere.

8

**Qualifications**

Lists the skills, knowledge and abilities needed to perform the job tasks. This should be a combination of formal qualifications, proficiencies at performing certain tasks, personal capabilities and years of experience.

9

**Personal attributes**

Describes the personal characteristics required for the position. This could include personality traits such as motivation, work ethic, punctuality and willingness to be a team player.

10

**Selection criteria**

Lists the skills, experience and knowledge that are considered to be essential, desirable or generic in an applicant. The selection criteria are the standards the selection panel will consider when assessing and comparing applicants for the advertised position.

## Write a job description

Flexible and active job descriptions encourage employees to grow within their positions. For example, 'developing and implementing a system of ordering office supplies' is more interesting and goal-focused for an office manager than 'routinely ordering office supplies'.

If the duties and responsibilities of a job change, the job description must be updated to reflect the changes. The job description should not only reflect the job's history, but also consider what the job holder will need to achieve in the future to reach the organisation's long-term objectives.

Job descriptions take many different forms, with some communicating information to potential applicants more clearly than others. Poorly written job descriptions can fail to attract a good pool of applicants.



## Style and language guidelines

Using the appropriate style and language is important when writing a job description. Finding the right candidate for a position is not just a matter of providing information about the job, but also depends on how you communicate this information. The language used in a job description should be clear and concise.

Here are some guidelines and examples to help you prepare job descriptions.

### Use an active verb in the present tense

Use the present tense and structure each description with an action (active verb) and an explanatory phrase.

*Examples:*

- Maintains client records.
- Greets hotel guests in a friendly and sincere manner.
- Administers anaesthetic agents and supportive treatments to patients undergoing surgery.
- Delivers a high level of customer service.

### Include details to add meaning and clarity

Where necessary, include details about why, how, where or how often the action occurs, to add meaning and clarity.

*Example:* Collects all employee time sheets on a fortnightly basis for payroll purposes.

### Use gender-neutral and unbiased terminology

Use a title like 'the employee' or 'the salesperson' instead of referring specifically to a male or female.

### Use specific language

*Examples:*

Instead of 'good communication skills', specify the need for the 'ability to communicate technical information to non-technical audiences'.

Instead of 'handling administrative chores', describe the specific tasks, such as 'receiving, sorting and filing monthly personnel action reports'.

### Beware of words leading to different interpretations

Avoid using words that can be subject to different interpretations.

*Examples:* good, frequently, some, complex, several, occasional

**Provide explanations**

Provide an explanation for words that may be interpreted differently.

*Example:*

'Handles media emergencies' can be interpreted in multiple ways.

'Manages and executes strategies to handle negative media publicity' is clearer and more specific.

**Avoid using jargon and technical language**

Avoid using jargon and technical language as much as possible.

Applicants are also unlikely to understand organisation-specific terms.

*Example:* 'Performs Gaj-Jac reroll if random SIT readings exceed PPLT' is excessive use of jargon and technical language.

## Organisational policies and procedures

Check the policies and procedures at your workplace before you begin working on a job description. Organisational policies and procedures for job descriptions may cover writing style, formatting and information to be included in the description. For example, your organisation may use standardised forms to outline the format and flow of the job description.

Many organisations have formal HR policies and procedures in place to:

- create a unified and consistent flow of work tasks and outcomes
- ensure documents that enter the public domain, such as advertised job descriptions, are standardised and accurately represent the organisation
- develop an internal 'bank' of standardised job descriptions; for example, so equitable comparisons can be made between jobs for salary decisions.



## Work health and safety (WHS) obligations

Job descriptions can have legal ramifications, so organisations have procedures in place to manage the legal aspects of recruitment and selection. There are work health and safety (WHS) obligations related to hiring new employees.

The job description must accurately reflect the WHS requirements for the job. WHS roles and responsibilities need to be consistently included across all sections of the job description so they are clearly understood, as they form an integral job function.

WHS considerations need to be included in the job objective statement, the list of key duties and responsibilities and the list of selection criteria.

Organisations are obliged to provide employees with:

- safe premises
- safe machinery and materials
- safe systems of work
- information, instruction, training and supervision
- suitable working environments and facilities.

## Example: job description including WHS responsibilities

Consider how WHS responsibilities will be included in the appropriate sections of a job description. Here is an example of a job description for the role of factory supervisor.

<b>Job title: Factory supervisor</b>
<p><b>Job objective</b></p> <p>Assist in the supervision and development of employees within the factory, and ensure quality products are manufactured in a safe manner</p>
<p><b>Roles and responsibilities</b></p> <p><b>Job-specific duties:</b></p> <ul style="list-style-type: none"> <li>• Hold responsibility for low batch production</li> <li>• Assist with all technical requirements within the factory</li> <li>• Ensure effective and efficient production methods are employed</li> <li>• Ensure customer quality standards and specifications are met</li> <li>• Assist in organising transport for deliveries and pick-ups</li> <li>• Input data into the computer system</li> </ul>
<p><b>Work health and safety responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Carry out duties in a manner that does not adversely affect the employee's own health and safety or that of others in the workplace</li> <li>• Comply with all relevant WHS and injury management legislation</li> <li>• Cooperate with measures introduced in the interests of workplace health and safety</li> <li>• Undertake health and safety training as provided</li> <li>• Correctly use the information, training, personal protective equipment and safety devices provided</li> <li>• Refrain from intentionally misusing or recklessly interfering with the health and safety information, training, personal protective equipment and safety devices provided</li> <li>• Undertake only those tasks for which the employee is authorised and/or has the necessary training, and for which all necessary safety arrangements are in place</li> </ul>
<p><b>Selection criteria:</b></p> <ul style="list-style-type: none"> <li>• A number of years' experience in supervising factory production</li> <li>• Proven experience in managing distribution logistics for a medium-sized manufacturing business</li> <li>• Knowledge of computer inventory programs</li> <li>• Knowledge of WHS issues relevant to work activities and work area</li> <li>• Knowledge of safe work procedures and WHS training relevant to work activities and work area</li> <li>• Strong interpersonal skills</li> </ul>

## Practice task 2

1. Explain the purpose of a job description.

2. Collect a job description from your organisation, or one you are familiar with. What are the elements of the job description? Are the style and language used in the job description appropriate?

# 1C

## Consult with relevant personnel about the job description and workforce strategy

Before writing a job description, talk to other people who are familiar with the job. Listen to their ideas and thoughts on the job's duties and responsibilities and how it fits in with the organisation's overall workforce strategy. Doing this will give you an insight into the job from different perspectives.



### Strategic workforce planning

Strategic workforce planning is an ongoing process used to match the organisation's needs and priorities with those of its workforce. The primary aim of this process is to make sure the organisation can meet its organisational, service and production objectives and its regulatory and legislative requirements. The recruitment process must therefore be informed by the developed workforce strategy.

When developing a workforce strategy, consider the following:

- The current workforce profile – the demand and supply factors currently facing the organisation
- The future workforce view – the organisation's needs, considering emerging trends and issues
- Closing the gaps – actions that need to be taken to deliver the targeted future

### Key issues addressed in a workforce strategy

There are many key issues that need to be addressed in any workforce strategy.

Key issues addressed in a workforce strategy may include:

- knowledge requirements for sustaining and progressing the organisation
- staff retention – particularly highly qualified and skilled personnel
- staff mentoring to develop and maintain the skills of personnel
- developing career pathways through succession planning
- valuing older workers and putting strategies in place to ensure their knowledge is not lost
- building staff loyalty through offering attractive employee packages and creating a supportive workplace culture
- recruiting for new strategic directions
- targets for specific qualifications, capabilities or attributes
- targets for workforce diversity; for example, age, ethnicity, experience, gender, working styles and personality types.

## Consult relevant personnel

Try to obtain as much information as you can from all relevant people to make sure what you plan to include in the job description is accurate and appropriate. Seek out the advice of the relevant personnel.

Here is an outline of the types of information a current job holder and or the manager can provide.

Current job holder	Managers
<p>The person currently doing the job may be the one who can tell you most about the position. You may be able to ask the current job holder to write their own brief job description to help you understand the role from the employee's position. You can also compare the information you receive from the incumbent job holder with the input you receive from managers and supervisors.</p> <p>Ask further questions, such as the following:</p> <ul style="list-style-type: none"> <li>• What is the purpose of the job?</li> <li>• What are the main day-to-day tasks?</li> <li>• What responsibilities do you have in the position?</li> <li>• What tasks and responsibilities are of the highest priority?</li> <li>• Who do you work closely with?</li> <li>• Why is the job important?</li> <li>• How has the job description changed during your time in the job?</li> <li>• What are the most important qualities and attributes needed to hold the position?</li> <li>• What qualifications are essential for the position?</li> </ul>	<p>Managers can provide you with valuable information about the job role and what is expected from the employee, and can help clarify what tasks and responsibilities are not part of the job. They will also have a clear understanding of how the role fits into the organisation's workforce strategy.</p> <p>In some cases, higher-level managers may want to contribute to the development of a job description. Others may need to sign off on a job description to ensure its accuracy before the position is advertised. It is important that you always check your organisation's policies and procedures to determine who to consult when developing a job description.</p>

## Consult other personnel

Other personnel that you are able to obtain relevant information from will include work colleagues and HR personnel.

### Colleagues

Some jobs require employees to work together closely on a day-to-day basis. If you need further information about the job after consulting with the job holder and relevant managers, consider talking to other employees who work in direct contact with the position.

- Colleagues may be able to provide you with significant information about the tasks and responsibilities the job involves.

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### HR personnel

The HR department can assist you in gathering information for a job description. Personnel who work directly with recruitment should be able to provide you with helpful tips and guidance. Their knowledge of the organisation and recruitment experience should be highly relevant to the recruitment process you are involved in.

## Collate information

Once you have consulted with relevant personnel in the organisation, you can bring all of the information together. Draw out and compare the ideas that have come up during your consultations to ensure the job description is accurate.

### Example: job analysis interview

Here is an example of a job analysis interview for the role of events coordinator.

**Job analysis: Events coordinator**  
**Interview with events manager, 10 August**

HRA: What are the key tasks of this role?

EM: Well, the key task is definitely dealing with the logistics of planning and running events. This includes working closely with each client, organising suppliers, handling the set-up and pack-down of the venue and coordinating with the function supervisor, who is in charge of the staff on event days.

HRA: What key personal attributes are essential for this role?

EM: The job requires someone who is very organised, conscientious and good with details. It is important that the employee can juggle many tasks at once and coordinate what many different people are doing. They must also be good under pressure, because this job involves a lot of deadlines and, unfortunately, things don't always go exactly to plan.

HRA: What tasks and responsibilities do not form part of this role?

EM: That's a good question. The events coordinator is not responsible for organising catering or function staff on the day. They are the responsibilities of other people in our team.

HRA: What qualifications are essential and what are not?

EM: It is essential that they have a Certificate IV in Event Planning. I must say, though, that I would definitely like to have someone who has training in bookkeeping too. It's not officially part of the job role, but I think it's valuable knowledge that we need to have access to.

HRA: How many years of experience should candidates have?

EM: Candidates must have at least two years' experience. Events are seasonal, and I need someone who has done the full 12-month cycle at least twice, so they understand the different demands associated with different seasons.

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HRA: How would you define success in this role?

EM: A successful employee in this role will deliver consistently high-quality events. They will work productively with other staff members to organise and coordinate all people in advance and avoid the unnecessary stress of events that have not been well planned. They will actively encourage suppliers and other staff members to deliver a high-quality product at all times. They will take initiative and consider better ways of doing things, as well as research more cost-effective suppliers. Most importantly, they will deliver superior customer service to all our clients.

HRA: What level of authority does this role hold?

EM: The events coordinator reports directly to me. Officially the role is one step below the function coordinator and function caterer, but they are all expected to attend function meetings and contribute equally. An employee who proves themselves in the role will be given the opportunity to take greater responsibility for events and to work more independently as time goes on. This, of course, would also be reflected in an increase in salary, benefits and authority within the company.

HRA: What areas for improvement have you identified with previous employees in this role?

EM: I mentioned bookkeeping before – we've encountered some problems with account-keeping in the past. Invoices haven't gone out and coordinators have sometimes not stayed within the allocated budgets. This is why I think we need to improve our training offerings, and why I'd like to hire someone with bookkeeping skills. We've also had some problems with employees not being able to work some of the irregular hours, such as night events in the middle of the week.

HRA: The employee currently in the role says that performance assessment involves evaluating each event. Is this correct?

EM: Yes and no. We do evaluate each event in terms of meeting our performance standards, but we also assess the coordinator in other ways.

HRA: How else do you assess the performance of the event coordinator?

EM: We have formal avenues. We look at key performance indicators, like the number of events coordinated and the annual revenue turnover. We also seek client feedback and conduct peer reviews, because it is such a teamwork-dependent environment.

### Practice task 3

Choose a colleague, classmate or friend and interview them about their job. If possible, interview their manager and colleagues about their knowledge of the job. Record your findings.

A large, empty rectangular box with a thin blue border, intended for recording the findings from the interview task.

# 1D

## Assist in ensuring job descriptions comply with legislative and organisation requirements

Job descriptions must adhere to all legislative requirements and should reflect the organisation's requirement for a diverse workforce. A common-sense approach to writing and advertising job descriptions should suffice in most situations. However, take care not to be in breach of legislation.

### Legislative requirements

Most organisations have existing policies and procedures in relation to job descriptions, which are written to be in line with legislative requirements. Here are some examples of relevant websites to refer to for federal and state/territory matters when it comes to employment.

#### Federal

Here is a list of websites to refer to for information concerning overall legislative requirements and relevant codes of practice and standards for all employment matters:

- Australian Government: [www.australia.gov.au/topics/employment-and-workplace](http://www.australia.gov.au/topics/employment-and-workplace)
- Australian legislation and regulations: [www.comlaw.gov.au](http://www.comlaw.gov.au)
- Fair Work Ombudsman: [www.fairwork.gov.au](http://www.fairwork.gov.au)
- Department of Industry and Science: [www.innovation.gov.au](http://www.innovation.gov.au)

#### States and territories

Here is a list of websites to refer to for information about overall legislative requirements and relevant codes of practice and standards for employment matters specific to your state or territory:

- Australian Capital Territory: [www.legislation.act.gov.au](http://www.legislation.act.gov.au)
- New South Wales: [www.legislation.nsw.gov.au](http://www.legislation.nsw.gov.au)
- Northern Territory: [www.dcm.nt.gov.au](http://www.dcm.nt.gov.au)
- Queensland: [www.legislation.qld.gov.au](http://www.legislation.qld.gov.au)
- South Australia: [www.legislation.sa.gov.au](http://www.legislation.sa.gov.au)
- Tasmania: [www.thelaw.tas.gov.au](http://www.thelaw.tas.gov.au)
- Victoria: [www.legislation.vic.gov.au](http://www.legislation.vic.gov.au)
- Western Australia: [www.slp.wa.gov.au](http://www.slp.wa.gov.au)

### Diversity and equity in employment

Diversity refers to the range of employees in a workplace. The central principle of workplace diversity is the creation of workplaces free from discrimination, harassment and bullying by encouraging respectful, healthy and secure working environments. Equity relates to the issue of fairness in the workplace.

Workplace diversity and equity policies recognise the value of individual differences, establish methods to manage such differences appropriately and consider appropriate action to take to eliminate discrimination.

Diversity and equity in employment covers the following:

- Gender and age
- Language
- Ethnicity
- Cultural background
- Sexual orientation
- Religious belief
- Marital status and family responsibilities
- Educational level
- Life experience
- Work experience
- Socioeconomic background
- Personality

## Equal employment opportunity (EEO)

The concept of workplace diversity and equity includes the principle of equal employment opportunity (EEO). The purpose of EEO policies is to discourage the discrimination or exclusion of particular groups of people in the workplace, including women, Indigenous Australians, people with disabilities and those who suffer disadvantage on the basis of race or ethnicity. EEO policies remain an important foundation of the workplace diversity policy of an organisation.

Workplace principles of diversity and equity should be integrated into all aspects of human resource management, including the recruitment and selection process.

Here is a list of the legal frameworks that are relevant to the recruitment process.

### ***Racial Discrimination Act 1975 (Cth)***



Makes it unlawful to discriminate in employment on the grounds of race, colour or national or ethnic origin

### ***Sex Discrimination Act 1984 (Cth)***



Makes it unlawful to discriminate in employment on the grounds of a person's gender, marital status, pregnancy or potential pregnancy, or to sexually harass another person

***Australian Human Rights Commission Act 1986 (Cth)***

Provides for the rights of people with physical or mental disabilities and addresses complaints of discrimination in employment

***Work Health and Safety Act 2011 (Cth)***

Requires that all employers and employees maintain a secure, healthy and safe working environment, including taking practical precautions to prevent harassment. Workers must take reasonable care for their own health and safety and not adversely affect the health and safety of others.

***Disability Discrimination Act 1992 (Cth)***

Makes it unlawful for an employer to discriminate against a person on the grounds of disability (including a disease)

***Fair Work Act 2009 (Cth)***

Prohibits discrimination in awards and (subject to some exemptions) in the termination of employment

## Checklist for writing a job description

When you finish writing a job description, ask your manager or another colleague to check your work.

When writing a job description, ensure the:

- language you use does not discriminate against any social group
- job requirements listed are essential for performing the job
- language used is inclusive and avoids gendered terms
- appearance of age bias is avoided.

### Example: job description template

Here is an example that illustrates how to cover legislative requirements within a job description.

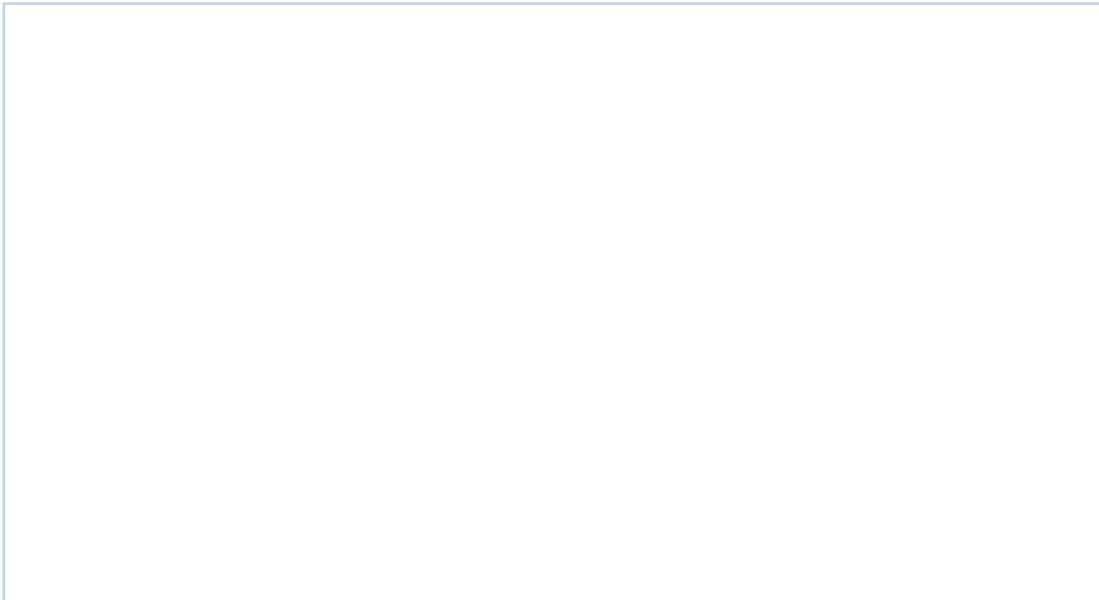
Job Description Template			
<b>Job title:</b>			
<b>Reporting to:</b>			
<b>Salary:</b>			
<b>Hours:</b>			
<b>Location:</b>			
<b>Purpose of the position:</b>			
<b>Key responsibilities and duties:</b>			
Duties of the role	Time spent	Competencies sought	Must have or optional (can be trained)
<b>General responsibilities:</b>			
<ul style="list-style-type: none"> <li>• To adhere to the organisation's equal opportunities policy in all activities, and to actively promote equality of opportunity wherever possible.</li> <li>• To be responsible for your own health and safety and that of your colleagues, in accordance with the <i>Work Health and Safety Act 2011</i> (Cth).</li> <li>• To undertake such other duties as may be reasonably expected.</li> <li>• To provide a healthy and comfortable working environment; smoking is prohibited throughout the organisation, except in specially designated areas.</li> </ul>			
<b>Academic and/or trade qualifications:</b>			
<b>Work experience and skills:</b>			
Manager's signature:			
Date:			

## Practice task 4

1. Visit the websites listed in this section to research federal and state/territory legislation and regulations applicable to your workplace. Make a list of all the legislation and regulations that will be relevant to you when developing a job description.



2. Find out and obtain a copy of the relevant policies and procedures in your workplace for ensuring job descriptions do not contravene legislative requirements. Make a list of these policies and procedures.



# 1E

## Obtain approval to advertise the position

Once you have completed a job description, you need to have it approved. Getting approval of the job description involves checking legal obligations and accuracy, identifying changes and checking adherence to organisational policies and procedures.

### Authority to approve the job description

The person who has the authority to approve the job description may be the head of recruitment or the managing director. Approval may be required from a group of people; for example, a group consisting of the relevant department manager, the recruitment manager and the chief executive officer (CEO).

Find out who has the authority to grant approval for job descriptions to be advertised in your workplace. It is your responsibility to ensure the job description is approved and that any paperwork or signatures needed as part of the approval process are obtained.



### The approval process

You need to be aware of the approval process and know how long it will take. This is important when advertising because your organisation will select and purchase advertising space on specific dates.

Find out how approval is given. Is it as simple as emailing your manager the job description and waiting for an email reply, or is the process more complicated?

While you will not always have control over when other people give their approval, it is important to remember that developing the job description is only the first step in the scheduled time line of the recruitment process.

When you have prepared the final draft of the job description, check for and correct any errors in spelling, punctuation and grammar, and then submit it to the relevant stakeholders for approval. When people read a finished document, they can see any gaps more easily and then ask you to amend or add text.

It is essential that you complete this step before you recruit, even if your time line is tight.

### Negotiate changes

The approval process may involve stakeholders requesting changes to the job description for various reasons. Ensure that the necessary changes are made.

If someone tells you they are not happy with the job description as it stands, make sure you clarify with them how it can be improved and what exactly needs to be changed. The better you understand the changes required, the faster you can make them.

Remember that if changes are made to a job description, the final version needs to be resubmitted for approval.

### Reasons changes may be requested

- Spelling or grammatical errors
- Inaccurate information
- Information to be added
- Unsatisfactory formatting
- Lack of adherence to organisational policies and procedures

## Final check

Modify the draft as necessary and return it to the relevant people for final approval.

When all the stakeholders are satisfied that the job description is correct and represents the position's overall objectives, they approve and accept it as the formal document used to determine whether an applicant is suitable for the particular job.

Make sure each stakeholder signs and dates the document as appropriate. File the document so the people who have access to the organisation's personnel and recruitment files can locate it easily.

A job description is only ready for advertising once all final approvals have been received.

## Example: checklist for approving a job description

Here is an example of a checklist for approving a job description.

Organisational policy for job description approval process	
1. Section manager drafts final version of job description with input from colleagues and HR department	<input type="checkbox"/>
2. Section manager sends email with job description attachment to department manager	<input type="checkbox"/>
3. Section manager receives response from department manager	<input type="checkbox"/>
4. Section manager incorporates any amendments into job description and resends to department manager	<input type="checkbox"/>
5. Repeat step 4 until department manager approves job description	<input type="checkbox"/>
6. Department manager approves job description by signing and dating document and returns it to section manager	<input type="checkbox"/>
7. Section manager sends email with job description to company director with department manager copied in	<input type="checkbox"/>
8. Section manager receives response from company director	<input type="checkbox"/>
9. Section manager incorporates any amendments to job description and resends to company director	<input type="checkbox"/>
10. Repeat step 9 until company director approves job description	<input type="checkbox"/>
11. Company director confirms final approval of job description by signing and dating document and gives the go-ahead to arrange advertisement	<input type="checkbox"/>
12. Section manager sends approved documents to HR department for filing	<input type="checkbox"/>
13. Recruitment manager in HR department organises advertising of position	<input type="checkbox"/>

## Practice task 5

Read the scenario, then complete the task that follows.

### Scenario

You work in the HR department for a franchise clothing store called Frocks. You submitted this job description for a store manager to your HR manager for approval.

#### Store manager position

Frocks is looking for a new store manager. The successful candidate will have a proven sales record and leadership skills. She should also have a flare for visual merchandising.

#### As a successful store manager you will possess the following:

- Have fashion retail management experience
- Strong sales ability and a proven track record in achieving sales targets or quotas
- Have outstanding customer service

#### Your day-to-day duties and responsibilities will include:

- Leadership and motivate sales staff
- Rostering for small number of staff
- Training and development of team members
- Ensuring the consistent achievement of sales targets
- Maintaining company policies and standards
- Supervision of store stock levels
- Merchandising and store presentation
- If you would value working for a highly respected international brand and are passionate about achieving success then we would love to hear from you.

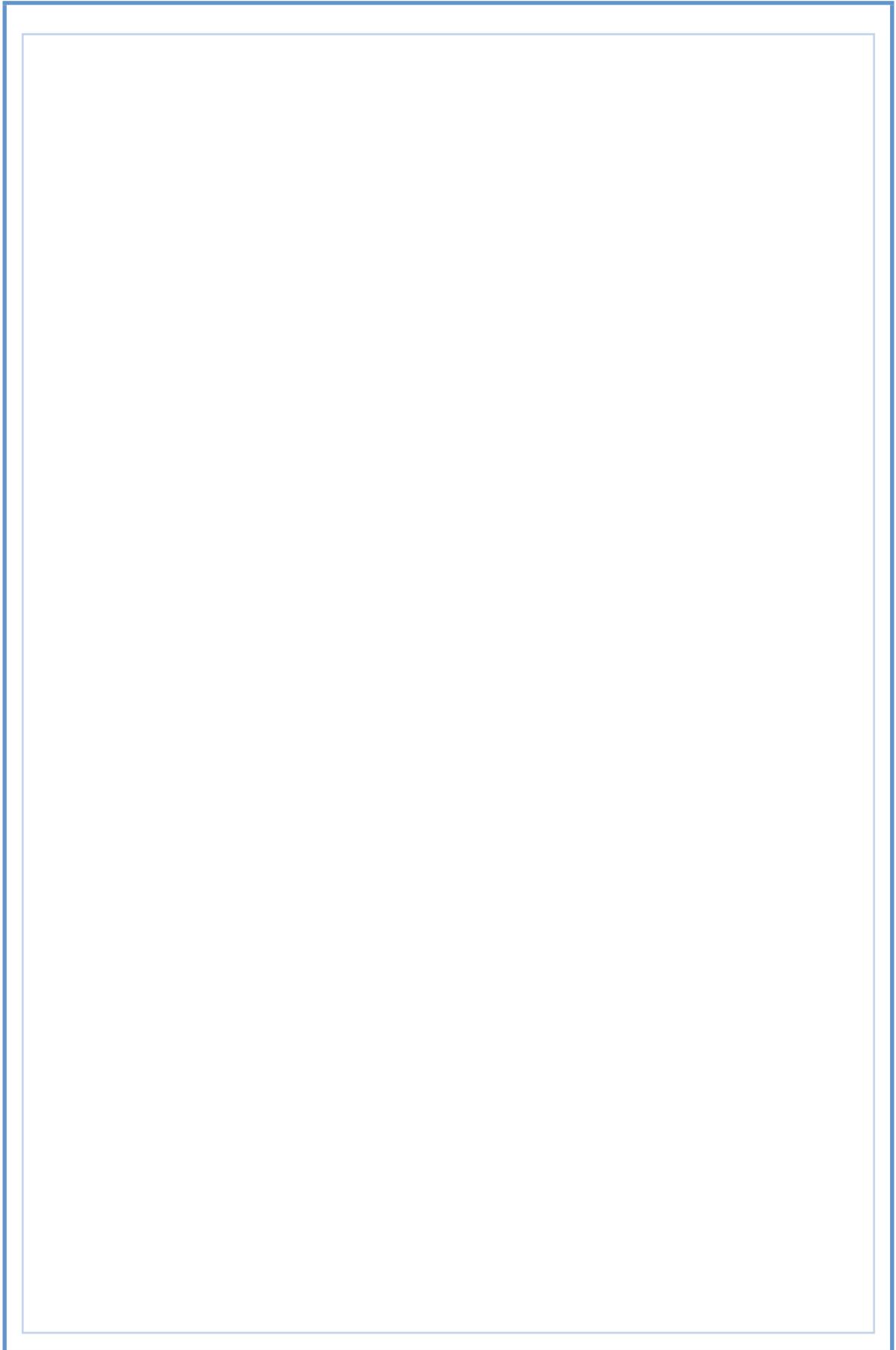
Your HR manager requested some changes:

1. Correct spelling and grammar mistakes.
2. Use only gender-neutral terms.
3. Add more personal attributes to clarify what we are looking for (paragraph 2).
4. Make sure all the dot points in the list of attributes are consistent and do not begin with a verb.
5. Add an introductory sentence about the company.
6. Add a sentence to communicate career progression possibilities.

Rewrite the job description to accommodate the changes. Make up any necessary information that is missing.

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## Summary

1. Plan the recruitment process in advance to make sure you know everything that needs to be done.
2. Develop a time line of activities for the recruitment process so the position is filled by the required date. This requires coordinating schedules with other employees.
3. When assisting in the preparation of job descriptions, ensure they adhere to organisational policies and procedures, legislation, codes of practice, national standards and WHS considerations.
4. Consult with other personnel in the organisation, including current job holders, managers and colleagues, to gather essential information about the job position and ensure it is in line with the organisation's workforce strategy.
5. Ensure that the final job description does not contravene relevant legislative or WHS requirements. It should also reflect the organisation's requirement for a diverse workforce.
6. Make sure you obtain approval from the right people within your organisation before advertising the position.

## Learning checkpoint 1

### Plan for recruitment

This learning checkpoint allows you to review your skills and knowledge in planning for recruitment.

#### Part A

1. At which stage of the employee life cycle is the development of a job description?

2. Explain what equal employment opportunity is. Provide an example of an EEO policy.

3. Explain why WHS responsibilities must be included in job descriptions.

#### Part B

Read the case study, then complete the task that follows.

##### Case study

Sally Hobbs runs her own dental practice, which employs four dentists, six dental assistants and a receptionist. One dentist has submitted his resignation to Sally this morning and will leave in exactly four weeks' time. Sally asks her assistant to develop a recruitment time line so a new dentist will take over the position as soon as the current dentist leaves. The job description needs to be approved by Sally and her head dentist, Dr Rajisha. Both need to be present during the interviews of potential candidates. Dr Rajisha will go away on holiday on 14 September for one week.

Use the information to develop a recruitment time line and present it to your trainer. Ensure time is allocated for all key stages of the recruitment process. Your time line should list the time allocated and date completed for each activity. The process's starting date is 2 September.



## Part C

Write a job description for your position. If you are not currently employed, choose a friend or family member and write a job description for their current job. Consult with relevant personnel to supplement your information. You should indicate who will approve the job description in the organisation.

The job description must:

- accurately reflect job role requirements and the organisation's workforce strategy
- adhere to organisational policy and procedures and WHS considerations
- not contravene any legislative or organisational requirements for a diverse workforce.

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## Topic 2

### Plan for selection

During the selection process, you are required to short-list, interview and ultimately decide on a successful candidate for the job. The selection process has many stages and involves many people. The stages include planning the selection process successfully, advertising the job vacancy so it is seen by the right people, short-listing candidates using essential selection criteria, scheduling interviews, and setting out the roles and responsibilities of the selection panel and how they must develop interview questions that do not breach legislative requirements.

In this topic you will learn how to:

- 2A Choose appropriate channels and technology to advertise a position
- 2B Advertise vacancies
- 2C Consult with relevant personnel to convene a selection panel and develop interview questions
- 2D Assist in ensuring that interview questions comply with legislative requirements
- 2E Assist in short-listing applicants
- 2F Schedule interviews

## 2A

## Choose appropriate channels and technology to advertise a position

When a job vacancy becomes available, it is necessary to advertise the position to attract applicants for the selection process. There are many options for how and where to advertise job vacancies. The first step is to choose the appropriate channels and technology to advertise the vacancy and/or identify a potential talent pool.

Channels and technology for advertising jobs may include:

- industry-specific websites and journals
- internal communications such as newsletters, intranet and emails
- newspaper advertisements
- recruitment agencies
- recruitment websites
- social media websites.

### Internal advertising

Internal advertising specifically targets current employees of the organisation who are interested and qualified to fill a vacancy within the organisation. Internal recruitment plays an important role in filling vacancies. Organisations sometimes have a policy of offering the appointment in-house first, when appropriate, and advertising more widely only if the position is not filled internally.

Depending on what type of vacancy it is, many organisations prefer to offer the position to their existing staff members first. To let people know a vacancy is available, the organisation may inform them using email, a newsletter, a bulletin-board notice, a meeting, an advertisement on the intranet or word of mouth.

Organisations often handle the recruitment process internally if the stakeholders believe there are potential applicants who meet the selection criteria among the existing staff members. This may occur if the organisation is restructured and there is a need to reposition staff members within it. It could also be the case if the demands of the vacant job are such that the appointee has to have an in-depth knowledge of the organisation and only an existing staff member can meet the selection criteria.



### External advertising

External advertising communicates job vacancy information to jobseekers from outside the organisation, with the aim of bringing new people into the organisation.

For most government jobs, the department or section involved has a legal obligation to externally advertise any position that becomes vacant, and also to advertise through the relevant government employment publication or government job search engine.

If your organisation has recently advertised a job vacancy, familiarise yourself with the style used and the medium the advertisement appeared in. You may be asked to conduct research to analyse the benefits of the advertisements your organisation places in terms of their cost effectiveness and their success in filling the positions.

Deciding which media to use and where to place an advertisement depends on the type of job that is vacant.

<b>Examples of job advertisement placements</b>
<ul style="list-style-type: none"> <li>• Most ads for skilled and semi-skilled tradespeople are placed in the situations vacant section of a newspaper's employment section and website.</li> <li>• Advertisements for executives and senior management positions occupy a prominent space in the front section of national and state weekend papers.</li> <li>• Trade journals and email lists are used for advertising industry-specific jobs, such as HR, the legal professions and information technology.</li> <li>• You may place the advertisement in a special newspaper feature that focuses on the type of position your organisation is offering.</li> </ul>

## Types of external advertising

Online advertising has grown as a major recruitment tool, with the internet becoming many organisations' first choice for advertising vacant positions.

You may also consider placing advertisements with an employment agency or local training provider so the vacancy appears on the organisation's job board.

Many organisations advertise their vacancies directly through schools, colleges or universities. Some offer cadetships or have an employment program that targets graduate jobseekers.

To encourage people who have a disability to apply, you may advertise with agencies that specialise in assisting jobseekers who have a disability; you can also include words such as 'with reasonable adjustment' in an advertisement, signalling that the working conditions can be changed within specific parameters to suit an employee who has a disability.

Here are examples of options that can be used for external advertising.

<p style="text-align: center;"><b>Media/newspapers</b></p> <ul style="list-style-type: none"> <li>• Local newspapers</li> <li>• Community media</li> <li>• City newspapers</li> <li>• National newspapers</li> <li>• Industry-specific newspapers and journals</li> <li>• International media</li> <li>• Specialist media</li> <li>• Trade journals</li> </ul>	<p style="text-align: center;"><b>Online</b></p> <ul style="list-style-type: none"> <li>• Job and employment (recruitment) websites (for example, <a href="http://www.seek.com">www.seek.com</a>, <a href="http://www.mycareer.com">www.mycareer.com</a>, <a href="http://www.governmentjobs.net.au">www.governmentjobs.net.au</a>)</li> <li>• Social networks such as LinkedIn, Facebook and Twitter</li> <li>• Industry-relevant blogs</li> <li>• Industry-specific websites</li> </ul>
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#### Targeted advertising

- University campuses
- Job fairs
- Local job boards
- Unemployment centres
- On premises (for example, placing a job advertisement notice in the window)
- Industry events
- Community groups

#### Networks

- Professional networks and events (for example, conferences)
- Industry groups
- Informal networks (contacts)

## Industry preferences

It is common for different industries to favour particular advertising options, both online and in other forms of media. In some cases, industry job boards are favoured because of their potential to reach the desired target market.

Depending on the type of job available, most organisations advertise a job vacancy both internally and externally, so a wide applicant pool is generated and a diverse and multi-skilled workforce is created.



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## Outsource to recruitment agencies

Outsourcing is another option for recruiting and selecting employees. This involves contracting a recruitment agency to perform all or part of the recruitment process on the organisation's behalf. The purpose of recruitment agencies is to find the right candidate for the job, at a price.

The recruitment industry is complex. It provides a broad range of services at varying costs. Recruitment agencies offer assistance in sourcing applicants by planning, developing and executing the advertising strategy. They have specialised knowledge of advertising and interviewing techniques and can manage part of or the entire recruitment process.



## Practice task 6

Read the scenario, then complete the task that follows.

### Scenario

The manager of your department sends you this information about a new job vacancy within the company that needs to be advertised.

<b>Company:</b>	Sunshine Cars Queensland
<b>Job position:</b>	Regional Sales Manager
<b>Location:</b>	Sydney
<b>Applicant requirements:</b>	<ul style="list-style-type: none"> <li>• Sales management experience in the automobile industry</li> <li>• Live and work in Sydney</li> <li>• Proven sales record</li> <li>• Leadership skills to manage a small sales team</li> <li>• Local industry knowledge (NSW)</li> <li>• Local network connections (suppliers, mechanics, competition)</li> </ul>
<b>Advertising time:</b>	3 weeks
<b>Advertising budget:</b>	\$9,000
<b>Comments:</b>	Sunshine Cars, a Queensland-based company, will open its first interstate sales office in the suburbs of Sydney. The Brisbane office currently employs 50 sales staff. The Sydney office will begin with five junior sales staff, with expectations to expand to 25 over the next two years. All applicants must submit résumés describing their previous sales experience.

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Write a list of clear recommendations for advertising the job vacancy internally and externally to generate a good pool of applicants for the position. Include the technology to be used to advertise the position.



## 2B

### Advertise vacancies

It is imperative to ensure that your advertising strategy for a job vacancy is aligned with the organisation's recruitment and selection policies and procedures. Here are some examples of what organisational policies and procedures may reveal in regards to advertising vacancies.

#### What organisational policies and procedures may reveal

- The appropriate channels for advertising vacancies
- Where job vacancies are generally advertised
- The requirements for posting vacancies on internal job boards
- The advertising budget available
- What advertising options the organisation prefers, including the preferred media
- What administrative details need to be included on job advertisements, such as contact people and methods for applying

### Advertising strategy

Whatever the situation and choice of advertising channel, all organisations are obliged to follow legal and ethical procedures when advertising vacancies. The basis of these standard procedures is that all applicants must have an equal opportunity to apply, the position's terms and conditions must be clearly articulated and selection processes must follow organisational and/or legislative requirements.

Here are some aspects that need to be considered when deciding on an advertising strategy.

#### Advertising budgets

Recruitment campaigns run by some of Australia's largest companies can cost hundreds of thousands of dollars every year. Companies equipped with the resources to spend a lot of money advertising for and hiring staff are ultimately looking for the best person for the job.

On the other end of the scale, a small family business may only be able to buy a small space in the local newspaper to advertise a vacant position. This may require them to lower their expectations of applicants unless the vacant position involves competitive conditions.

Always factor in the needs and resources of the organisation when you determine advertising options.

**Where to advertise and for how long**

In a competitive job market, there are plenty of potential applicants. It is therefore important to identify and target the potential talent pool. With so many advertising options to choose from, it can be difficult to know whether you are targeting the best groups of jobseekers and attracting the best applicants.

Think about how long a vacant job should be advertised for. Ask the following questions:

- When does the position need to be filled?
- How much time can you allow for advertising the position before you must move on with the selection process?
- Will you see any improvement in job applicants if you advertise for six weeks rather than two?
- What are the budget limitations for advertising?

**Target advertising**

A good advertising strategy is one that has a wide but targeted reach. Advertising widely allows you to appeal to a much wider audience and reach a greater cross-section of people from different backgrounds. If you also make sure to target certain areas directly relevant to the position, such as university job boards for graduates or online forums for healthcare professionals, you maximise your ability to generate a pool of qualified applicants.

**Advertising options**

The best advertising options to use depend on the type of organisation you work for and the type of job being advertised.

Some job vacancies require only local applicants, while others are international positions that need to be advertised across the world to generate a sufficient pool of qualified applicants.

**Administration**

The following administration details should be included as part of a job advertisement:

- Information required from applicants; for example, a résumé or standardised application form
- Submission formats; for example, whether applicants should send information by email or post a hard copy to the organisation
- Organisational or recruitment agency contact person and contact details
- The closing date by which applications must be received

## Example: job vacancy advertisements

Here are two examples of different job vacancies. The first advertisement would be best advertised in local media and on the job boards in Wagga Wagga and surrounding areas. The second advertisement would be best published across Australia and Asian countries on specialised international media and international recruitment boards.

WANTED HC TRUCK DRIVER  
Previous experience necessary  
For grain cartage in the Wagga Wagga area  
Ph: 0427 523 778

Position: Regional director, clinical operations  
Location: Singapore  
Sector: Clinical research  
Assignment:  
Responsible for the clinical activities of all departments and staff across Australasia. Monitors and leads the clinical operations management team, maintains appropriate resources to achieve maximum staff billability and adheres to quality management practices. Provides leadership in the implementation of company quality initiatives and business processes. Frequent international travel will be required.

## Practice task 7

Ask your supervisor or other colleagues if you can access the organisation's policies and procedures for advertising jobs. If your organisation does not have documented policies and procedures for advertising jobs, inquire about how the last job vacancy was advertised.

If you are not currently employed, interview a family member or friend about the policies and procedures for advertising job vacancies in their organisation.

Summarise these policies and procedures.

## 2C

## Consult with relevant personnel to convene a selection panel and develop interview questions

A selection panel is required to assess the applications received and prepare a short-list of applicants to invite for interviews. A panel is usually made up two to four people, often including the immediate manager of the vacant job, a colleague who is familiar with the area of work and sometimes a person from outside of the department (for example, from the HR department) to balance the panel's perspective.

Recruitment and selection policies and procedures should describe methods for assembling a selection panel and conducting interviews. The panel should reflect workforce diversity principles (for example, containing both men and women). Ideally, all panel members should receive training in fair recruitment practices so they are aware of their legal obligations during the interview and selection processes.

Each member of the selection panel is involved in:

- developing the selection criteria
- assessing incoming résumés
- short-listing candidates
- interviewing candidates
- deciding on the successful candidate.

## Prepare interview questions

The interview is considered the best tool for evaluating a candidate during the selection process. Interviews give the selection panel the opportunity to establish important information, clarify any ambiguities and assess a broad range of candidate abilities and attributes. They also allow the candidate to ask for further information about the organisation and the job.

Interviews need to be well structured and clearly documented. Interview times can vary, but are usually between 20 minutes and two hours long. The number of questions you ask a candidate directly influences how long an interview will take.

To prepare for interviews, work in advance with all members of the selection panel to determine the structure of the interview and the types of questions that will be asked. Decide what areas of questioning are required to cover all elements of the job specifications. Agree on who will ask which questions to avoid overlap and repetition. The same areas of questioning should be covered with all candidates so you can compare their responses.

Interview questions are categorised as:

- general
- behavioural
- situational.



## General questions

General questions are important because they provide essential information for assessing a candidate and clarifying information. General questions include open, background and job experience questions.

Here are examples of general questions that can be used when conducting an interview.

### Open questions

Open questions are often general questions used as icebreakers to begin the interview. They get the candidate talking and allow them the opportunity to introduce who they are and what they have done in their own words.

For example:

- Please tell us about yourself.
- Why are you interested in this position?

### Background questions

Background questions concern work history, education and qualifications.

For example:

- What experience do you have with social network marketing?
- Are you qualified to drive heavy vehicles such as tractors?

### Job experience questions

Job experience questions are used to test the candidate's job-related knowledge.

For example:

- What are the stages of the employee life cycle?
- What type of paint would you use for skirting boards in an old house?

## Behavioural questions

Behavioural questions are designed to find out information about the candidate's past behaviour, as this is often considered the best predictor of future performance. The focus should be on the applicant's previous work experience directly related to the skills, knowledge and abilities required in the vacant job.

### Examples of behavioural interview questions

- Can you tell me about a time when something went wrong at work?
- Have you ever had to deal with conflicting deadlines? How did you decide which task to complete first?
- Can you give me a specific example of a time when you used good judgment and logic to solve a problem?
- What is your typical way of dealing with conflict? Can you give me an example?
- Have you recently had to make a difficult decision?
- Describe a time when you anticipated potential problems and developed preventive measures.
- Tell me about a recent situation in which you had to deal with a very upset customer or co-worker.
- Give me an example of a time when you had to conform to a policy you did not agree with.

## Situational questions

Situational questions focus on hypothetical scenarios, asking the candidate to consider a set of circumstances and indicate how they would respond.

The scenarios you offer need to be relevant to dilemmas that applicants may experience when performing the vacant job. Ask all applicants the same hypothetical questions and directly compare their responses.

Here are some examples of situational interview questions.

### Scenario 1

You are working with a colleague who consistently makes mistakes that affect customers and impact your ability to do your own work. You have tried talking with this colleague, but the quality of their work has not improved. What would you do next?

### Scenario 2

In this role, you will provide administrative support for two managers. You are working on a large project with a looming deadline for one manager, when the other manager hands you a project and says it must be completed immediately. It is not possible for you to complete both projects within the deadlines provided. How would you manage the conflicting demands on your time?

### Scenario 3

A co-worker tells you in confidence that she plans to call in sick while actually taking a week's holiday. What would you do and why?

## Confirm the selection panel

To ensure that the selection process is effective and the best candidate is selected, it is important that all panel members are well prepared.

Select and confirm the selection panel before the closing date for applications for the vacant position. This allows panel members to participate in the entire process of assessing the submitted résumés and short-listing the applicants.

It is also important that panel members have time to prepare and familiarise themselves with the details of the vacancy so the short-listing and interviewing processes are accurate and efficient.

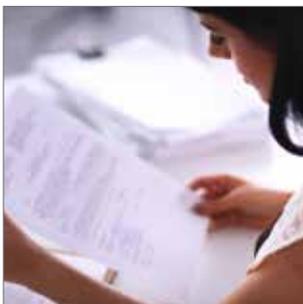
Here are key activities and responsibilities of the selection panel.

### Activities and responsibilities of the selection panel



Briefing each panel member on:

- their role and obligations as a panel member
- details of the job vacancy
- logistical details such as meeting times, interview dates and venues
- selection criteria
- selection training opportunities, if possible.



Panel members' responsibilities include:

- short-listing applicants for interviews
- participating in all interviews for the duration of the recruitment process
- maintaining consistency and ensuring fair treatment of all candidates
- staying aware of and adhering to their legal and procedural obligations
- declaring before an interview if they already know a candidate.



Formulating the selection procedure, including:

- the selection criteria
- how applicants are short-listed
- how short-listed candidates are assessed
- the interview structure and questions
- how reference checks are conducted.



Determining other procedural aspects, such as the following:

- Who will ask questions?
- Will any tests be included in the selection process?

## Write the selection criteria

The selection criteria describe the qualifications, skills, knowledge, abilities and experience a person needs to do the job effectively. It is important that the information advertised is consistent with the selection criteria used when assessing applicants.

An applicant must meet the essential criteria to be short-listed for interview and considered for the position. They will not be able to perform the job if they do not have the relevant qualifications, skills, knowledge and experience.

Throughout the selection process, you and the selection panel should focus on the essential criteria. Desirable criteria should only be evaluated after the essential criteria have been met.

The selection criteria you and the panel members develop will be specific to the job being advertised and the preferences of the organisation that is hiring. All panel members must understand exactly what each criterion means.

### Tips for writing selection criteria

- Ensure selection criteria are up-to-date and consistent with the requirements of the job.
- Distinguish between essential criteria (those that the person must satisfy to be able to do the job) and desirable criteria (those that will help them to do the job).
- Assess whether formal qualifications are essential to the performance of the job, and make this clear to potential applicants.
- Be specific; for example, 'communications skills' may refer to telephone techniques, writing reports for management or instructing technical operators.
- Determine how each selection criterion will be assessed; for example, from different application areas such as their résumé, the interview, referees' reports and testing.

## Clarify the interpretation

You may need to clarify the selection criteria so everyone is clear about what a statement really means. Clearly articulate any words or phrases in the selection criteria that may be ambiguous so everyone agrees about what they mean. For example, 'highly developed technology skills' is not a clear explanation of the specific computer applications or systems the applicant has to understand. Similarly, depending on the job level, 'ability to work in a team' may encompass leadership, negotiation, conflict resolution and problem-solving skills, or may simply imply that it is important to be able to cooperate and get along with people.

You may need to define these criteria and provide specific examples so everyone knows what skills and knowledge are being sought. Confirm whether your organisation still regards the skills listed as being essential or desirable.

It may be your job to prepare notes to help interpret individual selection criteria. Identify the evidence to use, such as a certificate, a discussion about the applicant's experiences, or a demonstration or test of the applicant's skills.



## Confirm with key personnel

Before you prepare an advertisement for a job vacancy, you need to finalise the selection criteria with the appropriate people in your organisation. The set of key selection criteria developed in conjunction with the job description is an extension of the list of job duties and responsibilities. For example, some of the criteria may refer to specific skills and experience, such as 'Demonstrated efficiency in maintaining information storage and retrieval systems'. Other criteria may focus on personal attributes, such as 'Ability to work in a team environment' and 'Capacity to meet deadlines'.

Each applicant is expected to address the selection criteria in their application by briefly explaining how they have met or can meet the job requirements, using examples from their experiences. It is therefore essential that everyone responsible for appointing a candidate to a position is aware of the specific skills, knowledge, abilities and aptitudes that the applicant must have, and that they agree about what is required.

Key personnel for appointing a candidate can include:

- the manager of the area the position is located within
- the person responsible for screening and sorting the applications
- each member of the selection panel.

## Example: café assistant selection criteria

Here is an example of the selection criteria for an advertised café assistant position.

<b>Key selection criteria for café assistant</b>
<p><b>Essential:</b></p> <ul style="list-style-type: none"><li>• Solid café experience</li><li>• Proven experience as a barista</li><li>• Experience with food preparation</li></ul>
<p><b>Desirable:</b></p> <ul style="list-style-type: none"><li>• Experience with Micros POS</li><li>• Experience in catering businesses</li><li>• Solid knowledge of food hygiene and cleanliness standards (HACCP)</li></ul>
<p><b>Key performance criteria</b></p> <p>Candidate can provide evidence of the following skills and knowledge:</p> <ul style="list-style-type: none"><li>• Leadership</li><li>• Customer service</li><li>• Technical skills and application</li><li>• Personal and professional development</li><li>• Teamwork and communication</li><li>• Continuous improvement</li><li>• Administration and documentation</li></ul>

## Practice task 8

Read the scenario, then complete the task that follows.

### Scenario

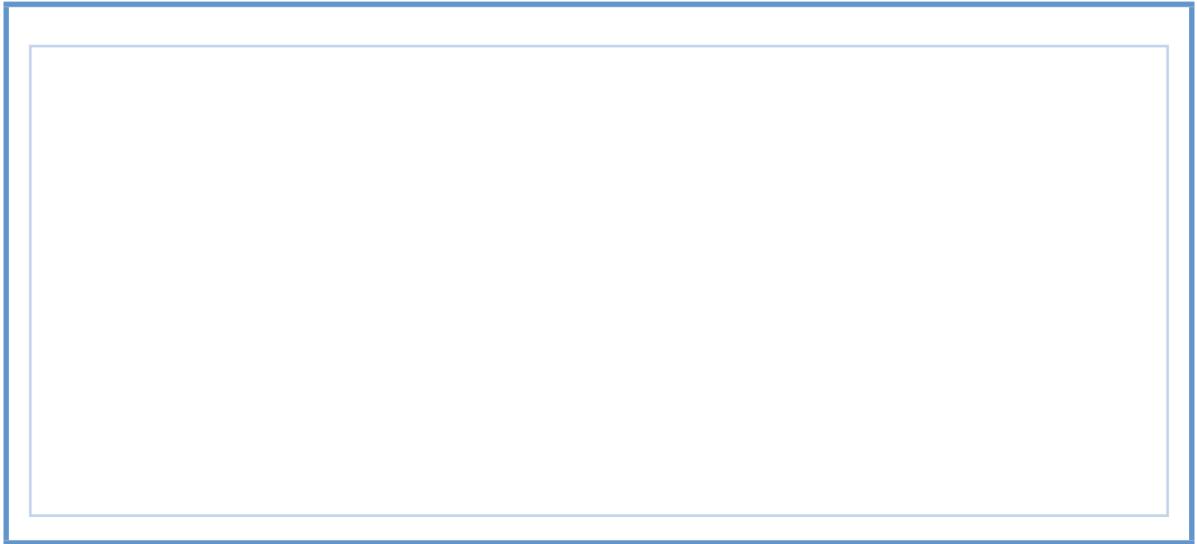
As a recruiter from the HR department, you are required to conduct interviews for a recently advertised position within your workplace. The selection panel includes you and the sales department manager. Here is the information about the new job vacancy to be interviewed.

<b>Company:</b>	Sunshine Cars Queensland
<b>Job position:</b>	Regional Sales Manager
<b>Location:</b>	Sydney
<b>Applicant requirements:</b>	<ul style="list-style-type: none"> <li>• Sales management experience in the automobile industry</li> <li>• Live and work in Sydney</li> <li>• Proven sales record</li> <li>• Leadership skills to manage a small sales team</li> <li>• Local industry knowledge (NSW)</li> <li>• Local network connections (suppliers, mechanics, competition)</li> </ul>
<b>Advertising time:</b>	3 weeks
<b>Advertising budget:</b>	\$9,000
<b>Comments:</b>	Sunshine Cars, a Queensland-based company, will open its first interstate sales office in the suburbs of Sydney. The Brisbane office currently employs 50 sales staff. The Sydney office will begin with five junior sales staff, with expectations to expand to 25 over the next two years. All applicants must submit résumés describing their previous sales experience.

Prepare a list of interview questions to ask candidates. Make sure the questions you ask are diverse, are relevant to the job and reflect the different interests of each panel member.

*continued ...*

*... continued*



## 2D

## Assist in ensuring that interview questions comply with legislative requirements

Recruitment and selection processes are subject to federal and state/territory legislative requirements. These exist to ensure no individual is discriminated against within the workplace and that the recruitment processes of all organisations are fair and just. Interview questions must be checked to ensure they do not breach any laws. It is important that all people involved in screening and interviewing candidates are trained in this area or, at a minimum, informed of their legal responsibilities and obligations.

Here is a list of relevant federal discrimination legislation that must be complied with when undertaking the interviewing process.

### Federal discrimination legislation

- *Racial Discrimination Act 1975* (Cth)
- *Sex Discrimination Act 1984* (Cth)
- *Australian Human Rights Commission Act 1986* (Cth)
- *Work Health and Safety Act 2011* (Cth)
- *Disability Discrimination Act 1992* (Cth)
- *Fair Work Act 2009* (Cth)

## Discrimination

Discrimination means treating a person with an identified attribute or personal characteristic differently from a person who does not have the attribute or characteristic. It also refers to creating conditions that indirectly discriminate against those who do not have the particular attribute. Discrimination against applicants (either intentionally or unintentionally) is not acceptable. All members of the interview panel need to understand their legal obligations. Interview questions should be prepared and checked in relation to discrimination before any interviews begin.

It is unlawful to discriminate against a person because of their:

- gender or sexual preference
- disability or impairment
- marital status
- political or religious beliefs
- cultural background or country of origin
- age
- physical features
- pregnancy (including potential pregnancy)
- involvement with a union or industrial activity.

## Inappropriate interview questions

When conducting interviews, panel members should only ask questions that are relevant to the skills, abilities, experience and knowledge required for the position. Questions that are discriminatory or attempt to elicit information from the candidate that could be used as grounds to discriminate against them are unacceptable and should not be used or contemplated for use. The only exception is when there is a valid occupational requirement for a role and the employer can objectively justify why a specific type of candidate is required; for example, a religious organisation may stipulate that only candidates of that religion should apply, if it is a genuine requirement of the role.

Questions need to be relevant to the job. Using standardised questions or a template is a good idea to ensure all candidates are asked the same questions, which have been compiled and checked in advance. This helps you to avoid discriminatory patterns emerging in the interview stage.

Avoid asking inappropriate questions regarding:

- place of birth, ethnicity or religion
- marital status, children or sexual preference
- gender or age
- location
- disability or illness
- lifestyle choices
- height or weight.

## Practice task 9

Examine the following questions. Do you think that they breach legislative requirements? If so, think of ways to rephrase the questions to find out the information you require without breaching anti-discrimination laws.

1. Are you an Australian citizen?

2. How much longer do you plan to work before you retire?

3. Is this your maiden name?

4. Do you live nearby?

5. Will you need personal time for particular religious holidays?

## 2E

## Assist in short-listing applicants

Short-listing occurs once the application period has closed. Although you may wish to begin assessing applications while the application period is still open, the final short-list should be compiled after the closing date.

The purpose of the short-listing period is to sort through all applications that have been received. Each applicant should be assessed on their ability to meet the selection criteria. The short-listing process should identify the most competitive candidates to invite to an interview.

Sorting through potentially hundreds of applicants can be time-consuming. However, it is important that you do a thorough job and short-list the best applicants for the job.



### The short-listing process

At least two members of the interview panel, including the immediate manager, should undertake the task of short-listing applicants. These people should have the best immediate knowledge of what is required for the position and be able to efficiently evaluate an applicant. The benefit of having two or more people assess applications for short-listing is that it helps to avoid potential bias that may inadvertently occur if only one person does the assessment.

Compare applications against the job description and work closely with the list of criteria that clearly outlines the skills and experience needed for the job. All applications must be assessed against the same criteria.

You can then eliminate applicants who do not meet the basic requirements for the job. Short-list the candidates who most closely match the job requirements and selection criteria.

Guidelines for short-listing applicants:

- Determine the selection method and prioritise criteria before you begin.
- Short-list based on the essential qualifications first, then compare those short-listed to the desirable criteria.
- Seek more information if necessary. The aim is to find the best person for the job.
- Be consistent. Document the decisions made and the reasons for them.
- Rank the candidates against each selection criteria. The ideal candidates will meet all or most of the criteria.
- Short-list only the number of applicants that you will have time to interview.

### Inform candidates

Once the selection panel has confirmed the final short-list, invite individual candidates to attend interviews for the position. You should also advise candidates who have not been short-listed that they have been unsuccessful. The most common way to do this is by email.

## Example: unsuccessful applicant

Here is a template drafted by an organisation. It will be sent out to an applicant who was unsuccessful in the short-listing process.

Dear (insert name here),

RE: (position title)

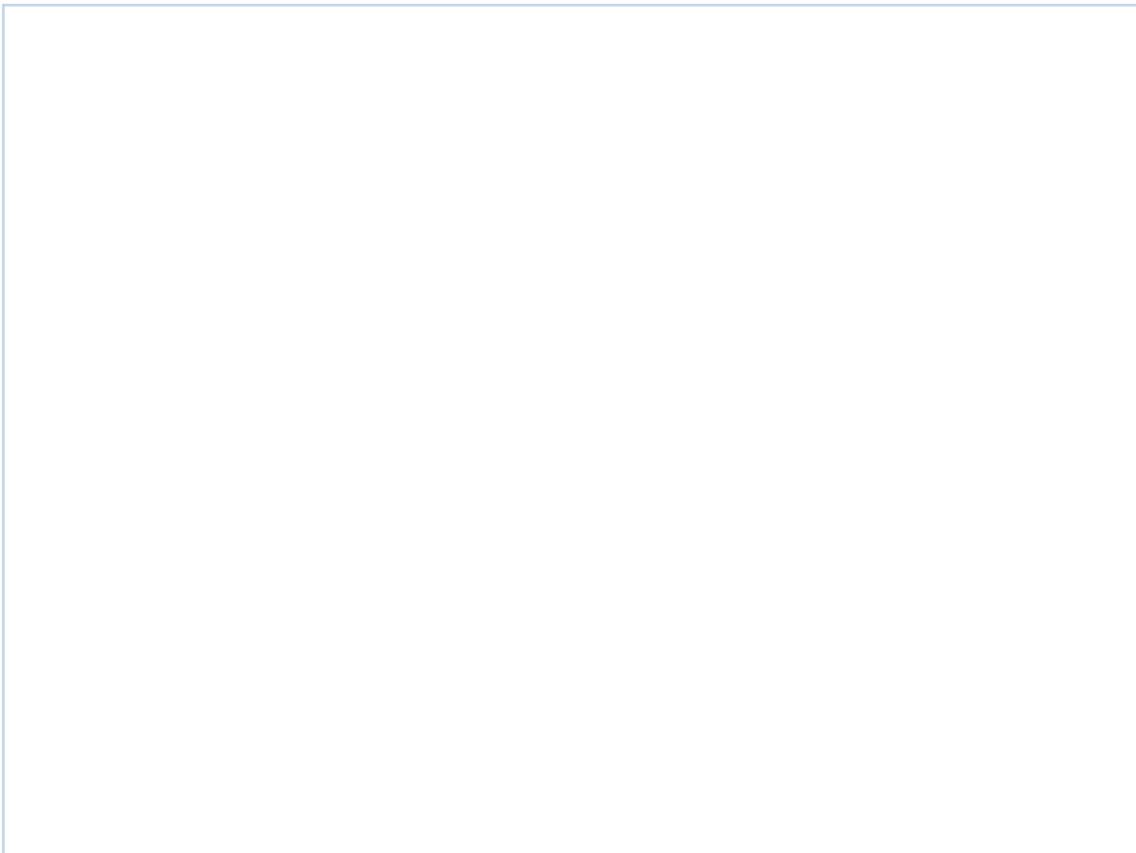
Thank you for your interest in this position. We appreciate the time and effort you spent in applying. We have received and considered many applications and unfortunately you have not been successful on this occasion.

Thank you for considering (insert company name) as a potential employer. We wish you well in your future job search.

Yours sincerely,  
(insert your name and title here)

## Practice task 10

Write a letter or an email to inform an applicant that their application for a position has been unsuccessful.



## 2F

## Schedule interviews

When you have compiled a short-list of applicants to interview, it is time to schedule interviews with the candidates and the selection panel.

Before contacting applicants, decide on the place and times of interviews with the selection panel. Panel members often have preferences for the interview schedule. Some members may prefer to do them all in one go, while others may prefer to have them scattered over a few days to fit in with other work commitments and to avoid interview fatigue. Discuss this with the panel and coordinate the times when everyone can be present.

In most cases, the organisation will have a deadline for filling a vacant job position. It is common for interviews to be scheduled closely over one or two weeks. Although scheduling interviews over one or two days may seem like an efficient way to get through them, some candidates may not be available on these days. If you are too inflexible when allocating times to interview, you may fail to interview strong candidates for the job.

Contact applicants and schedule individual interviews based on the dates and times that suit all panel members.



## Example: interview schedule

When allocating the times for interviews, remember to leave extra time to allow for preparation before and discussion after each interview. For example, you may have decided to hold hour-long interviews, so make sure you schedule 15–30 minute gaps between the interviews to allow the panel to run overtime if they need to, take a short break between interviewing candidates and prepare for the next candidate.

Time	Monday	Tuesday	Wednesday	Thursday	Friday
9.00 am				9.15 Feng Wang	
10.00 am					
11.00 am		11.15 Ciu Liu		11.00 Roberta Valiente	
12.00 pm				12.30 Victoria Batters	
1.00 pm		1.30 Mohammed Issa			
2.00 pm		2.45 Raymond Lutter			
3.00 pm	3pm Marie Sternbeck				
4.00 pm	4.15 Roberto Milenesa				
5.00 pm					

## Choose a venue

You need to organise the venue for the interviews. This may require you to book a suitable meeting room that can accommodate all panel members and the interviewee comfortably. Once the venue has been selected and confirmed, inform all people involved where the interviews are to be held.

## Contact applicants

The purpose of contacting each applicant is to inform them of your interest in their application and to invite them to an interview to further discuss their application.

The most common and direct method of contacting applicants is by telephone as it enables you to get an answer immediately. Emailing can be an option if scheduling interviews is not as urgent, if there are fewer applicants to interview or if it is an ongoing recruitment and selection process.

When a candidate accepts your invitation to attend an interview, select a date and time that suits the selection panel and the candidate.

Be as flexible as possible when scheduling interviews. If some candidates have difficulty attending on the dates or times you have set, discuss alternatives with the panel members. Short-listed applicants are the most competitive candidates for the job and you should make a fair effort to schedule an interview with each of them.

It is important to send an email following your conversation with the candidate to confirm the interview details in writing.

The confirming email should include the following details:

- The date and time of the interview
- The venue of the interview, including the address and directions
- Additional information; for example, details of what will happen during the interview, items the candidate should bring along and expectations of the selection panel
- Contact details for the candidate to use if they need further information or have particular requirements regarding the venue

## Confirm with panel members

When you have confirmed dates and times with each candidate, ensure you provide the panel members with the details. The best way to do this is to prepare a summary document that includes a schedule of all interviews and information about each candidate, such as their application letter and résumé. The more information the panel receives before the interviews begin, the more prepared and effective the interviewing stage will be.



## Practice task 11

Read the scenario, then complete the task that follows.

### Scenario

You are currently in the process of hiring a new account manager. Five strong candidates have been short-listed and will be interviewed over a period of a week. You receive the following information from the three panel members about their availability for the week.

Panel member	Job title	Availability for interview
Casper Schmidt	Department manager	Available all week except Monday 9.00–11.00 am and Friday 3.00 pm onwards
Naomi Popita	Line manager	Available all week except Wednesday
George Karanikas	HR consultant	Available every day between 11.00 am and 3.00 pm

You contact the five short-listed applicants to invite them to attend interviews. They provide you with this information.

Candidate	Availability for interview
Susan Li	Monday morning or any time Wednesday
Bill McCracken	Weekday afternoons after 2.00 pm
Leonina Papopolous	Any time Tuesday
Melanie Dortmans	Monday, Tuesday, Thursday or Friday before midday
Simon Mitchell	Only Friday

Draw up an interview schedule based on the information given to you. All three selection panel members must attend the interviews and you should allow around one hour for each interview.

## Summary

1. Advertise job vacancies in places that will reach your target market.
2. Advertise broadly to encourage a diverse range of applications for the position.
3. Convene the selection panel before the interviews begin to develop the selection procedure and selection criteria.
4. Develop interview questions based on the requirements of the job.
5. Use a variety of interview questions to gain a better understanding of each candidate's skills, knowledge and abilities.
6. Ensure none of the questions asked in an interview breach anti-discrimination laws.
7. Assess each candidate based on the same criteria and short-list the most outstanding candidates that meet the essential criteria for the position.
8. Schedule interviews over a designated period of time and coordinate with the selection panel so they can all attend.

## Learning checkpoint 2 Plan for selection

This learning checkpoint allows you to review your skills and knowledge in planning for selection.

### Part A

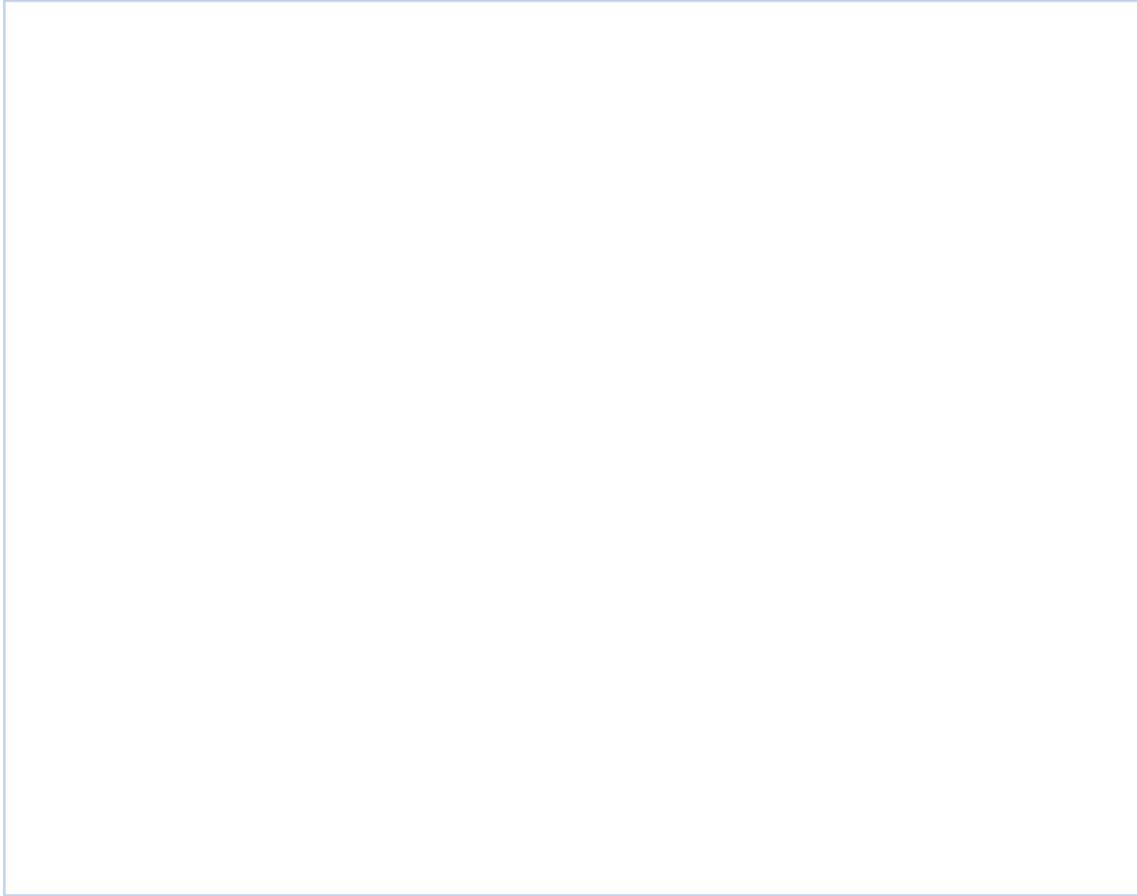
Research one of each of the following job boards:

- A city/local newspaper
- An online job board
- An industry journal/publication

Find out:

- when and how they advertise job vacancies
- the pricing options are for advertising
- the requirements an advertisement must meet (size, word count, etc.)
- the documents you need to send
- how the payment is made and when it is required.

Write a one-page report summarising what you have found out.



## Part B

Prepare an interview for a hypothetical job vacancy at a fictional organisation. To prepare the interview questions, come up with a brief job description and selection criteria for the job vacancy. You may wish to draw on positions at your own workplace as examples.

Explain how you will structure the interview, what areas you will cover, who should be on the selection panel and the estimated length of the interview.

Make sure the questions you develop:

- include general, behavioural and situational questions
- adhere to legislative requirements
- are directly relevant to the job
- are relevant to the selection criteria.



## Part C

Read the scenario, then complete the task that follows.

### Scenario

You are working for a hotel that has advertised in a local hospitality magazine for a new sous chef for the hotel restaurant. The selection panel has made a list of essential and desirable criteria for the position.

<b>Position: Restaurant sous chef</b>
<p><b>Essential criteria:</b></p> <ul style="list-style-type: none"> <li>• Minimum two years' experience in a commercial kitchen</li> <li>• Demonstrated experience with and knowledge of bulk food preparation and food presentation</li> </ul>
<p><b>Desirable criteria:</b></p> <ul style="list-style-type: none"> <li>• Certificate III in Commercial Cookery</li> <li>• Demonstrated knowledge of HACCP principles and quality assurance processes</li> <li>• Demonstrated knowledge of basic computer programs (Microsoft Word and Excel)</li> <li>• Demonstrated experience in and knowledge about catering for customers of different religions, cultures and nationalities</li> <li>• Ability to work under pressure</li> <li>• Ability to work within work health and safety practices</li> </ul>

You receive seven applications. The information from each applicant is summarised in the following table.

<b>Applicant</b>	<b>Summary of résumé</b>
Ben Davis	<ul style="list-style-type: none"> <li>• Two years' commercial kitchen experience</li> <li>• Certificate IV in Commercial Cookery</li> <li>• Trained in HACCP</li> <li>• Previous work experience in an office working with computer programs</li> <li>• Four years' work experience in Asia</li> </ul>
Joel Elbourne	<ul style="list-style-type: none"> <li>• Five years' commercial catering experience</li> <li>• Strong food presentation skills</li> <li>• Good under pressure</li> <li>• WHS training</li> <li>• Certificate II in Commercial Cookery</li> </ul>
Antonia Aphantitis	<ul style="list-style-type: none"> <li>• One year cook's apprenticeship</li> <li>• Strong computer skills</li> <li>• Certificate IV in Hospitality Management</li> <li>• Strong customer service skills</li> </ul>

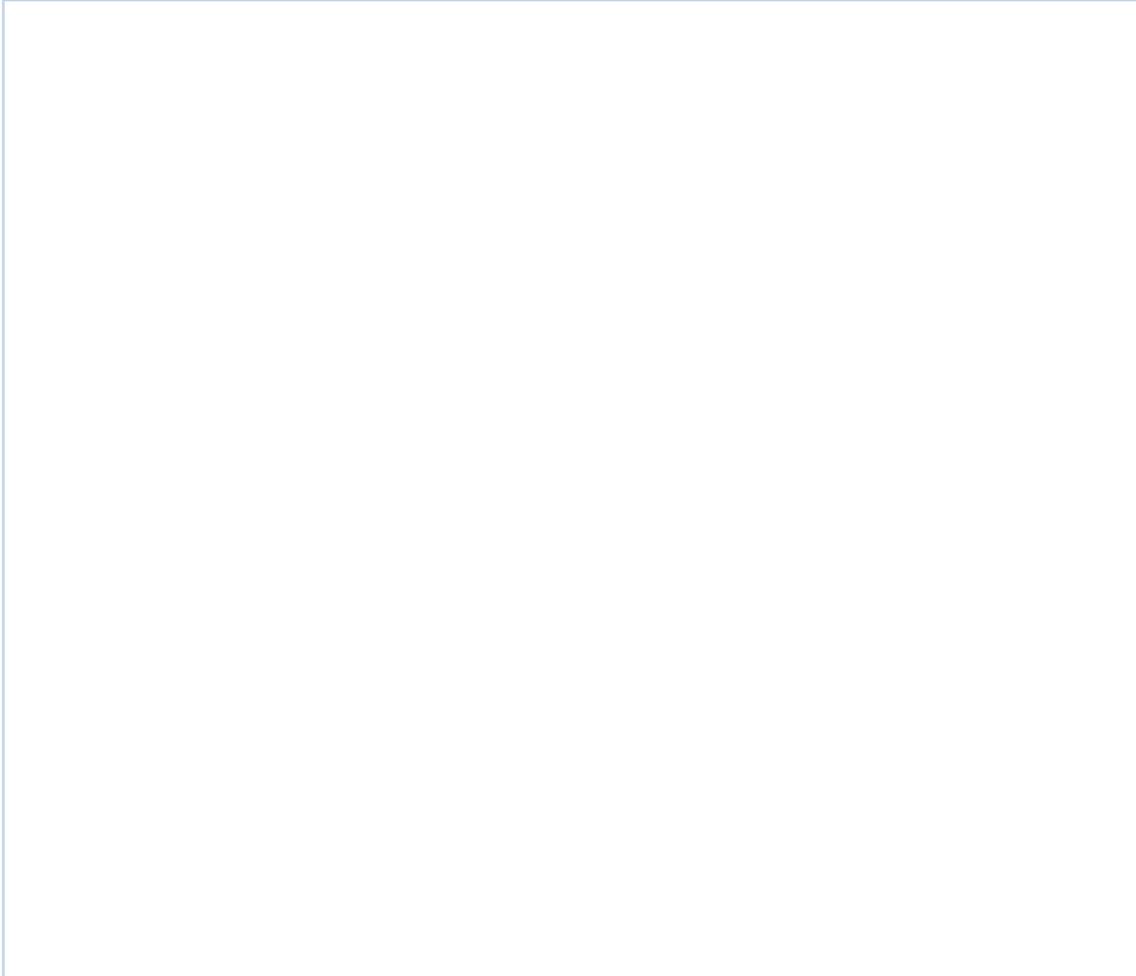
*continued ...*

... continued

Applicant	Summary of résumé
Tess Williams	<ul style="list-style-type: none"> <li>• Four years' waitressing experience</li> <li>• Strong food and wine knowledge</li> <li>• Currently studying Bachelor of Marketing</li> <li>• Solid knowledge of WHS</li> <li>• Strong leadership skills</li> </ul>
Nyung Pho Nguyen	<ul style="list-style-type: none"> <li>• Seven years' experience in the food industry</li> <li>• Three years as head chef at a Vietnamese restaurant</li> <li>• Leadership and management experience</li> <li>• Worked extensively with WHS and kitchen hygiene standards</li> <li>• Cert III in Commercial Cookery</li> <li>• Strong knowledge of computer programs for ordering goods</li> </ul>
Edward Li	<ul style="list-style-type: none"> <li>• Three years' cooking experience</li> <li>• Customer-service orientated</li> <li>• Menu design experience</li> <li>• Food hygiene knowledge</li> <li>• Extensive overseas experience</li> </ul>
Kristina Jackman	<ul style="list-style-type: none"> <li>• Four years' experience as a cook in a busy Sydney restaurant</li> <li>• Certificate III in Commercial Cookery</li> <li>• Product ordering experience</li> <li>• Worked closely with HACCP standards and procedures</li> <li>• Ran own commercial catering business for three years</li> <li>• Works well under pressure</li> </ul>

Use this information and the selection criteria to decide which four applicants should be invited to attend an interview for the position. Explain:

- why you selected these candidates
- the steps you need to take to schedule interviews with the four applicants.



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## Topic 3

# Support the selection process

Interviewing candidates for a job is a principal task of the selection process. The interview allows you to assess the skills, knowledge and experience of short-listed candidates and identify the most suitable candidate for the job.

The selection process requires you to conduct a job interview, determine the preferred candidate for the job and carry out reference checks. Once all of these elements have been completed successfully, a formal job offer can be made to the candidate.

In this topic you will learn how to:

- 3A Participate in the interview process and assess candidates against agreed selection criteria
- 3B Discuss assessment with the other selection panel members
- 3C Correct biases and deviations from agreed procedures and negotiate a preferred candidate
- 3D Contact referees for referee reports
- 3E Prepare a selection report and make recommendations to senior personnel for appointment
- 3F Advise unsuccessful candidates of the outcome and respond to any queries
- 3G Secure the preferred candidate's agreement
- 3H Complete all necessary documentation

# 3A

## Participate in the interview process and assess candidates against agreed selection criteria

The interview is an important element of the selection process. It provides a valuable opportunity to evaluate short-listed applicants in a face-to-face meeting and determine whether they are suitable for the job.

An interview generally consists of a variety of job-related questions to assess whether the applicant demonstrates the required attributes to perform the job they have applied for.

### Conduct an interview

When interviewing candidates, keep in mind what you want to find out about them. Working to a structured plan helps to keep the interview on track. Manage your time effectively and make sure you cover all the topics you wish to in the allocated time. It is a good idea to take notes during the interview so you can keep track of all the information discussed.

Here are some tips to assist in conducting effective interviews.

#### Tips for conducting effective interviews

**1**

Make sure all panel members are prepared. All members should read each candidate's résumé ahead of time and clearly understand the selection criteria against which the candidates will be evaluated.

**2**

Know what information you want to find out during the interview.

**3**

Make sure every question has a purpose. If a question has no strategic significance, do not ask it.

**4**

Show you are attentively and actively listen to the candidate's responses by re-stating or paraphrasing what you have heard. This will help confirm the understanding of all parties.

**5**

Do not rush the candidate into providing an answer; give them reasonable time to think and respond.

6

Understand what is being said in the interview. When a candidate offers an answer to a question that does not address the specific information you are seeking, ask additional questions to draw out more specific answers.

7

Try not to make judgments during the interview. Evaluate each candidate in the discussion with panel members after the interview.

8

Take notes during the interview. If several top candidates emerge, you will be required to make close comparisons between them, so the minor details will become more important.

## Formal or structured interviews

Formal or structured interviews involve asking all applicants a set of predetermined questions.

This type of interview allows you to:

- check before interviews begin that the questions adhere to legislative requirements
- discuss all the job-related areas you wish to address
- ask all candidates the same questions, giving you a basis on which to compare their skills and abilities and to objectively rank the candidates.

## Informal or unstructured interviews

Informal or unstructured interviews do not include predetermined questions or a standardised method of evaluating and ranking candidates. These interviews rely on an instinctive reaction to candidate competencies, allowing the panel to explore particular issues that arise as the interview proceeds.

Informal or unstructured interviews are often used at the initial stage of the interview process as a way to appraise each candidate in a relatively relaxed setting. They are often used preceding a round of formal or structured interviews.

## Open an interview

When you meet a candidate for the first time, greet them by giving your name and position and introducing the entire selection panel. View the first minutes of the interview as an opportunity to build rapport with the candidate. Try to put the candidate at ease.

It is a good idea to explain the purpose and format of the interview at the beginning. This includes describing what your expectations of the interview are, what areas you will cover and an estimate of how long the interview will last.

## The main body of an interview

The main body of an interview should cover all the areas planned with the selection panel. This varies for different interviews, depending on what information you want to find out.

Determine the flow of interview questions based on the type of job on offer and what information the selection panel is interested in finding out.

When conducting an interview, listen carefully to the candidate's responses and take notes for future reference. Be aware of any attempts to evade questions, and probe deeper if required. Pay careful attention to the candidate's personal style, attitude and values, as these will also help you to form a balanced opinion about their suitability.



## Close an interview

Asking the candidate if they have any questions about the job or the organisation more generally is a good way to begin wrapping up the interview. Candidates' responses show you if they have thought about the job and listened during the interview process.

Explain the next steps in the selection process so the candidate is aware of what to expect. You do not have to be precise with time details, but giving a general indication of when they can expect to hear from you is a good idea.

Finally, thank the candidate for a productive interview and their interest in the job. Once the candidate leaves, summarise your notes and discuss the candidate's ability to meet the selection criteria with other panel members.

## Match the selection criteria

Applicants are expected to address the selection criteria in their applications by briefly explaining how they have met or can meet the job requirements, using examples from their experiences.

A scoring system is often used to identify candidates' abilities to match selection criteria. Score the candidates before the interview. On completion of each interview, use the information obtained to review the accuracy of the initial scores you assigned. For example, was the candidate able to supply relevant, current examples from their experience? Were their responses clear and articulate? Did they express a sound understanding of the types of tasks expected of them? Were they able to indicate what knowledge and expertise they would bring to the job?

## Example: scoring candidates

Here is an example summary sheet for scoring candidates' alignment with the key selection criteria for a position.

Summary sheet: key selection criteria						
Candidate	1 (list criterion)	2	3	4	5	6
Jacinta						
Amal						
Matthew						
Craig						
Antonia						

A = Outstanding, B = Excellent, C = Satisfactory, D = Marginal, E = Unsatisfactory

## Practice task 12

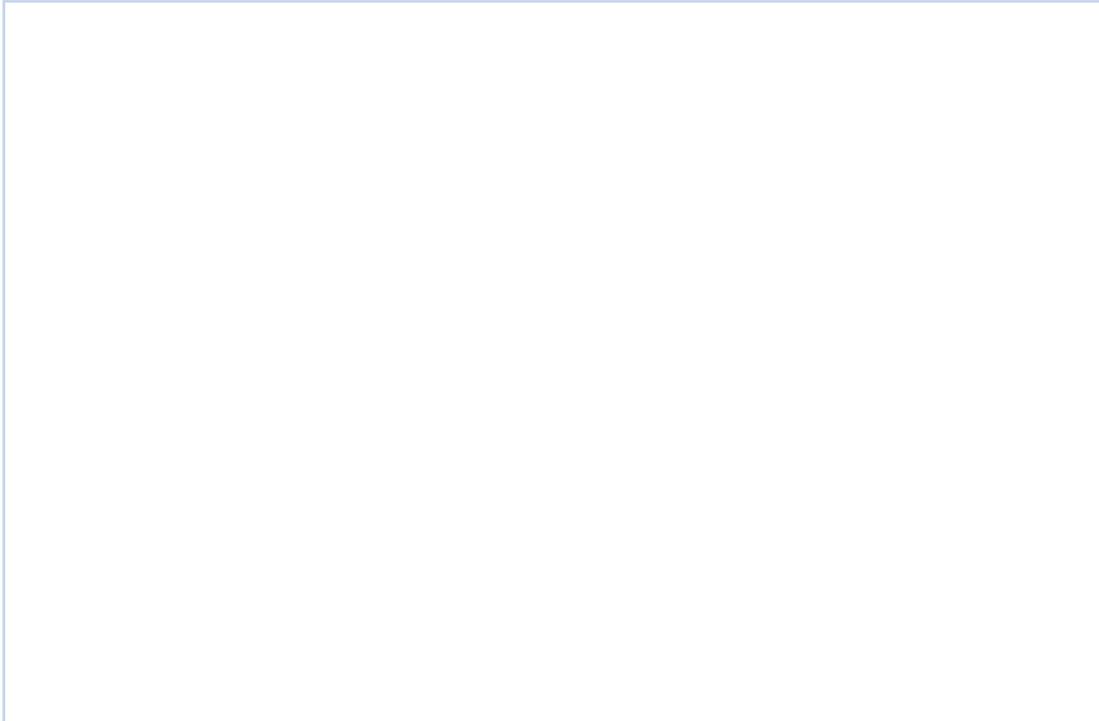
1. In which situations is an informal or unstructured interview useful?

2. What are the advantages of conducting a structured interview?

*continued ...*

*... continued*

3. What is the structure of an interview session? Explain the three stages involved.



## 3B

### Discuss assessment with the other selection panel members

At the conclusion of each interview, discuss each candidate. Gather your own thoughts on the candidate and then complete a candidate evaluation form. Discuss with the group the candidate's ability to meet the selection criteria.

#### Post-interview reflection

Gather your own thoughts on each candidate before you discuss them with the other panel members. Look through the notes you took during the interview and add any further ideas or reflections. Write down the candidate's strengths, as well as any concerns you may have about their ability to perform the job. This will help you in the evaluation process and may also be used to give feedback to unsuccessful applicants.

Questions to ask when reflecting on the interview:

- What was your overall impression of the candidate?
- In what way did the person fit the job description?
- Do you have any concerns about their suitability for the position?
- Do you think the candidate would fit with the organisation? In what way?

#### Candidate evaluation forms

A candidate evaluation form enables all panel members participating in the interview process to record and assess each candidate's suitability in a structured way. All panel members should individually complete this form immediately after each interview, providing a method to compare each panel member's evaluations of different candidates. It lists the specific job-related criteria against which each candidate is rated.

Some criteria and factors will be more important than others. Avoid giving each element the same evaluation weight.

When completing an evaluation form, it is important that you consider all the information received about the candidate throughout the selection process. This includes their résumé and application letter, any test scores and the interview itself.



## Example: candidate evaluation form

Here is an example of a candidate evaluation form.

Candidate evaluation form					
Position:					
Candidate's name:			Interviewer's name:		
Date of interview:					
If one of the questions does not apply to the position, please write N/A in the comments section.					
1 = Exceeds requirements					
2 = Meets requirements					
3 = Needs training/development					
4 = Does not meet requirements					
Criteria	1	2	3	4	Comments
Education and qualifications					
Relevant work experience					
Interest in and understanding of the position					
Time management					
Teamwork abilities					
Communication skills					
Problem-solving skills					
Overall	Highly recommended/Recommended/Need more information/Not recommended				
Comments					
Date:					
Signature:					

## Panel discussion

The purpose of the panel discussion is to reach a final decision about which candidate is most suitable to perform the job. The panel discussion needs to be guided carefully. Avoid comparing candidates until all interviews have been conducted. Systematically review each candidate's résumé together during this time.

Opinions about candidates are subjective and there may be disagreement. Consider all information and data offered and reject any comments that are irrelevant, erroneous or biased.

Here are examples of key aspects of a panel discussion.

**Key focuses for the panel discussion**

- The candidate's ability to do the job – does the candidate demonstrate education achievements, experience and/or training that is applicable to your workplace?
- The candidate's work ethic – does the candidate demonstrate a genuine motivation for the job, leadership capabilities and a drive to work hard?
- The candidate's ability to fit with the culture and values of your organisation – how well does it appear the candidate can work with others in a team?

## Ranking candidates

A common aspect of assessing and discussing candidates is to rate and rank them. Ranking candidates should always be on the basis of merit.

Ranking can help the panel members reach an agreement on a preferred candidate. Ranking candidates involves:

- interviewing all candidates before you begin the ranking process
- ranking each applicant against the selection criteria, ideally on a points scale; this is useful when applicants are of similar backgrounds and strengths and it is difficult to differentiate between them
- asking additional questions, especially if you have information gaps, by conducting another interview with the preferred candidate or contacting referees to ask questions about specific areas of competence.



## Practice task 13

1. What are the key focuses for the panel discussion?

2. What methods of assessment help the panel reach agreement and a final decision about which candidate is most suitable to perform the job?

# 3C

## Correct biases and deviations from agreed procedures and negotiate a preferred candidate

Interviews aim to elicit objective information from candidates, but they are also subjective because they rely on panel members assessing and judging candidates based on the panel members' own perspectives and prejudices.

Take time to think about any bias or prejudice that emerges during the interview process and make your best efforts to correct it. Limiting bias and deviations from planned interview procedures better equips you to make the best possible decision about who is the most suitable candidate.



### Bias in interviews

Bias may become evident when assessing candidates during or after an interview. It negatively affects candidate evaluation. Opinion or prejudice on the part of an interviewer can sometimes be displayed during the interview process if the personal or demographic characteristics of candidates influence an interviewer's evaluations in a discriminatory way.

Examples of factors that may lead to interview bias include perceived attractiveness, race, gender, backgrounds, attitude and cultural background. These factors are typically not relevant to whether the individual can perform the job and must not be allowed to influence candidate evaluation positively or negatively. Their influence on interview ratings and rankings should be eliminated or minimised.

Although the questions asked may not in themselves be discriminatory, the interpretation of answers by the panel may exhibit prejudice. Be aware and check for prejudice during panel discussions. For example, if career ambition is an important attribute in a candidate, ensure you are not subconsciously associating a particular gender or cultural background with that attribute and excluding others.

Using structured interviews held by multiple interviewers, coupled with training on anti-discriminatory practices, may help to identify, reduce and eliminate bias in the interview process.

### Interview deviations

The advantage of a structured interview is that each candidate is asked the same questions. This provides a consistent base from which to objectively compare candidates' abilities to perform the job.

When assessing candidates never deviate from the selection procedures and make sure you assess all candidates using the same method and focus on job-related factors only. If the discussion with panel members drifts into irrelevant areas, correct this immediately to avoid discriminatory outcomes.

## Negotiate

The purpose of the panel discussion is to agree on a preferred candidate. When you have evaluated all candidates and corrected any bias or deviations, you need to reach consensus with all panel members about who is the preferred candidate for the job.

If the panel members are divided on who is the most suitable candidate for the job, negotiate until you reach agreement.

Negotiation is a dialogue between two or more parties with the intention of reaching an understanding or resolving points of difference. In the selection process, negotiations are concerned with deciding on the preferred candidate for the job.

Sometimes all members of the selection panel will agree on who is the best candidate. In this case, the negotiation process is quick and straightforward. However, when disagreement occurs, the panel must negotiate until a selection decision is reached.

Negotiations generally begin with one member of the selection panel stating who their preferred candidate is. Each panel member must then express their agreement or disagreement with this proposal and explain why. Panel members who disagree with the proposal must offer an alternative, stating who their preferred candidate is and explaining their choice. As a group, you should then discuss the reasons for and against each proposed candidate until consensus is reached.



## Effective communication

During the negotiation process, you must be able to communicate why you prefer one candidate over the others. The better prepared you are for this discussion, the more effective you will be in persuading other panel members that your preferred candidate is the most suitable for the job.

Prepare for the negotiation by reviewing the selection criteria and listing the key reasons why your preferred candidate is the most suitable for the job. Also prepare arguments that explain why you believe other candidates are not as qualified. The more confident you are in your explanations, the better chance you have of convincing the other panel members. In some cases you may strongly believe that only one candidate is suitable for the job. In other cases you may be more flexible and be influenced by the opinions of other panel members. Either way, you need to be clear about your opinion prior to the negotiation stage.

Successful negotiation relies on panel members being interested in the discussion and focused on reaching an agreement. This requires clear and respectful communication and a willingness to hear all points of view.

## Negotiation factors

There are several factors that can affect the negotiation process.

### Time

How much time do you have to reach a decision? The more urgent it is to reach a decision, the less time you have to discuss your opinions and persuade other panel members to agree with you. Be prepared and anticipate the arguments of other panel members so you can respond promptly.

### Authority

Authority can be used in the negotiation process to exercise control over the final decision reached. Authority can come in various forms. The most obvious form of authority is hierarchy within the organisation. In some cases, the most senior manager on the selection panel has a large amount of influence over the decision about the preferred candidate.

### Information

Information is a key tool in the negotiation process. The more information the panel has about candidates, the better the final decision is likely to be. Information can help you build effective arguments for or against appointing candidates. A lack of information about candidates makes negotiations more difficult.

## Reach a consensus

When you find it difficult to reach a consensus in the negotiation stage, you may need to take a break in the negotiation process and meet at a later date to continue the discussion. This allows panel members to step away and take time to reflect on the discussion.

When the panel reaches an agreement on a preferred candidate for the job, you can move on to the final stages of the selection process.

### Tips to manage difficult stages of negotiation

- Maintain your composure, avoid emotional reactions and keep your voice at a calm level.
- Avoid making statements that directly disagree with other members' statements.
- Acknowledge that you hear what other panel members say.
- Agree with the parts of the message that you accept.
- Seek clarification of the parts of the message that you do not accept.

## Example: dialogue drawn from a negotiation process

The following example is dialogue drawn from the negotiation process for the appointment of a marketing assistant. The people involved in the negotiation are the members of the selection panel: the company director (CD), the senior marketing assistant (SMA) and the marketing manager (MM).

- CD: My preferred candidate for the job is Elisa Hansen. She meets all the essential selection criteria and she has strong communication skills, which I think are very important. Additionally, I think her experience in marketing roles in different industries will be good for us. I think we could use her insight and knowledge of different products when we begin redesigning our marketing strategy next year.
- SMA: I agree. She's also my preferred candidate. Her marketing qualifications surpass the requirements for the job, she's driven and ambitious and she seems comfortable working in high-pressure environments.
- MM: I agree that Elisa is a strong candidate with many attributes essential for the job. However, I have some hesitations about her. I think her lack of experience in a real estate business is concerning. Her qualifications are good, but maybe too good. She may outgrow the assistant role too quickly, get restless and leave the company, so we'll be back hiring again. My preferred candidate is Richard Morel (RM). He has experience working for a reputable real estate company and he has sales experience, which I think we can use. He's well-presented and I think he would work well with our clients.
- SMA: The concern I have with Richard is that he has no marketing qualifications at all.
- MM: Yes, but he has more job experience than any other candidate, he has knowledge of all the required computer programs and he showed sufficient knowledge of marketing principles in the interview. I think he's the strongest candidate.
- SMA: But don't you think that his lack of tertiary qualifications will need us to invest more in his training and development in the long run? I think that without sufficient qualifications we will have difficulty promoting him to a more senior role if he performs well.
- MM: Richard has proven skills in marketing administration, running successful marketing events and developing media packs specifically for the real estate sector. He meets all the desirable selection criteria.
- SMA: Yes, this is true. But without any marketing qualifications he does not meet the essential selection criteria. This is a problem.
- MM: Okay, yes. I can see it is a problem.
- CD: If Richard doesn't meet the essential selection criteria for the job, there's no point discussing whether or not he meets the desirable criteria. It's my understanding that Elisa meets all essential criteria. Is that right?
- MM: Yes, she does.
- CD: I understand the hesitations you have about Elisa being overqualified for the role. I think, however, we have flexibility within the organisation to offer her further training and opportunities to engage her as she grows in the role. In this sense I think she would be a good asset to us, particularly with her understanding of developing direct marketing strategies. Do you think you could work with Elisa?
- MM: Yes, I do. I guess you're right. We could use her qualifications in a productive way.
- CD: So we agree that she's the preferred candidate?
- MM: Yes.
- SMA: Yes.

## Practice task 14

Discuss the concept of bias with your friends and family. What prejudices do they think they have? Here are some questions that may help you with this discussion:

- Do men make better managers?
- Does it matter how attractive candidates are perceived to be?
- What does a strong accent tell you about a candidate?
- Does religion matter in the workplace?

See if you can identify any elements of bias or prejudice in people's responses to these questions. How do you think these types of biases could influence interviews? How can you correct them?



# 3D

## Contact referees for referee reports

Once a preferred candidate is selected, it is usual procedure to undertake a reference check. A referee is a person who knows the candidate and can provide additional information about them in a job-related context.

Each applicant should provide a list of referees on their résumé. If they have not been provided, contact the candidate and ask them to provide this information. Appropriate referees are those who have direct experience of a candidate's work, education or training.

The best referee is someone who has supervised or worked closely with the candidate at the candidate's current or previous employer. If the current supervisor is not included in the list of references, you may wish to ask the candidate why and follow up with suitable alternatives.



### Check references

The aim of a reference check is to verify the candidate's work and performance history. In many cases, reference checks are only undertaken for the preferred candidate. However, you may wish to check references for all short-listed applicants. It is good practice to contact at least two or three previous employers for each candidate.

Check all references after you have completed the interview process and before you make a job offer so you can objectively evaluate the candidate's application and the information gained during the interview.

Just as you prepared for the interview stage of the selection process, plan and structure the questions to ask referees. Make sure all questions are job-related. The reference check should be done thoroughly to avoid potential problems once you have hired a candidate.

### Reference information

Reference checks help to substantiate and validate the information supplied by each candidate and provide further insight into each candidate's skills, knowledge and abilities.

One member of the interview panel should be responsible for conducting the reference checks to directly follow up on issues or questions that come up during interviews.

The most common methods of conducting reference checks are requesting a letter of reference from each referee and holding telephone interviews. Different organisations favour different methods. Check your organisation's selection policies and procedures or discuss them with the HR department.

Provide each referee with a brief job description, as this may help them answer your questions. Reference checks need to be consistent. Ask for precise information and confirm facts. Using a standardised referee reporting form that reflects the selection criteria can be helpful.

Information to confirm with the referee:

- Length of employment
- Relationship of the applicant to the referee
- Job title
- Brief details of responsibilities
- Reasons for leaving
- Attendance, including sickness absence
- Performance

## Prepare for a reference check

Preparing what you will ask referees in advance is essential if you want to be consistent and effective, especially if it is a telephone interview.

Develop a set of questions to ask referees based on the questions you asked candidates during the interview process. This helps confirm and expand on the most critical information for selection. Ask all referees the same questions to help you compare the information you receive for each candidate. As when interviewing candidates, you must ensure that no questions you ask referees breach legislative requirements or are discriminatory in any way.

When you evaluate the information gathered from referees, remember to weigh it up in the same manner for all applicants. For example, information that disqualifies one candidate should also disqualify others it applies to. You must also consider who provides the information. The referee provides information according to their own perceptions and subjectivities. Particularly if the information received about a candidate is negative, weigh it carefully against information from other referees before making a hiring decision.

### Example: what to ask when contacting referees

Here are some questions you may wish to ask when contacting referees.

#### Basic information questions

- Could you confirm starting and ending employment dates? When did they leave the company?
- Why did they leave the company?
- Can you describe the job responsibilities of their position?

#### Performance questions

- Were there any issues you are aware of that affected their job performance?
- Were they promoted while with your company?
- How did they handle conflict? How about pressure? Stress?
- Can you comment on their leadership skills?
- How would you describe their technical skills in this job?
- How would you evaluate their performance? Can you speak about their strong and weak points? What was noted as needing improvement during performance reviews?
- What were their achievements in this role?
- Are they better suited to a team-based role, or working alone? Why?

*continued ...*

... continued

- Did you ever have cause to counsel them about any aspect of their work? Why?
- Is there anything about their performance you felt needed improvement?
- If I describe the position we are hiring for to you, could you describe how good a fit you think (name) would be for the position?
- What type of position do you believe they are best suited to? Why?
- Can you describe this person's experience working as a member of a team?
- What training or targeted learning would you recommend for them?
- Have they got potential to develop further? In what way?
- Is there anything I haven't asked that you would like to share with me?

## Telephone reference check

There are many general guidelines that should be followed when undertaking a reference check over the telephone.

### Guidelines to help you conduct a reference check by telephone

- Introduce yourself to the referee.
- State the purpose of the call.
- Confirm the relationship between the person giving the reference and the candidate.
- Confirm basic information about the candidate's previous job, including title, functions, salary and dates of employment.
- Briefly describe the position that the applicant has applied for.
- Ask the job-related questions that you have prepared.
- Take notes.
- Listen carefully to what is said, and what is not.
- Ask for further details if any concerns about the candidate's ability are raised.
- Once the telephone call is concluded, document the questions and the answers to discuss with panel members.

## Written reference check

A request for a reference in writing is similar to conducting a telephone interview except that you will provide the information and your questions in a written form rather than verbally. Written reference checks often use a standard reference form that asks the referees to list all information in a structured manner.

Include information about the job description just as you would in a telephone interview. State all questions clearly.



## Evaluate a reference

When the reference checks have been completed, the panel member responsible needs to report the findings to the rest of the panel members. You may wish to do this in writing or in a group discussion. The reference checks should help you confirm the top candidate for the position. However, if the reference checks are not positive, consider alternative options with panel members. This may include requesting additional references from the top candidate, checking references of the second- or third-ranked candidates or re-advertising and starting the recruitment process again.

### Practice task 15

Read the scenario, then complete the task that follows.

#### Scenario

You are selecting a new employee for a job within your organisation. You have a final short-list of two candidates for the position and it is now your responsibility to conduct a reference check for both applicants. Here is an example of the job description.

#### **Job description: Magazine journalist**

The successful candidate is to research and write news articles and features for a hospitality-focused magazine. The magazine has a defined readership and focus on travel, hotels, leisure activities and restaurants.

The position requires writing, sub-editing and basic design skills. Knowledge and experience in online journalism is highly desirable, though not essential.

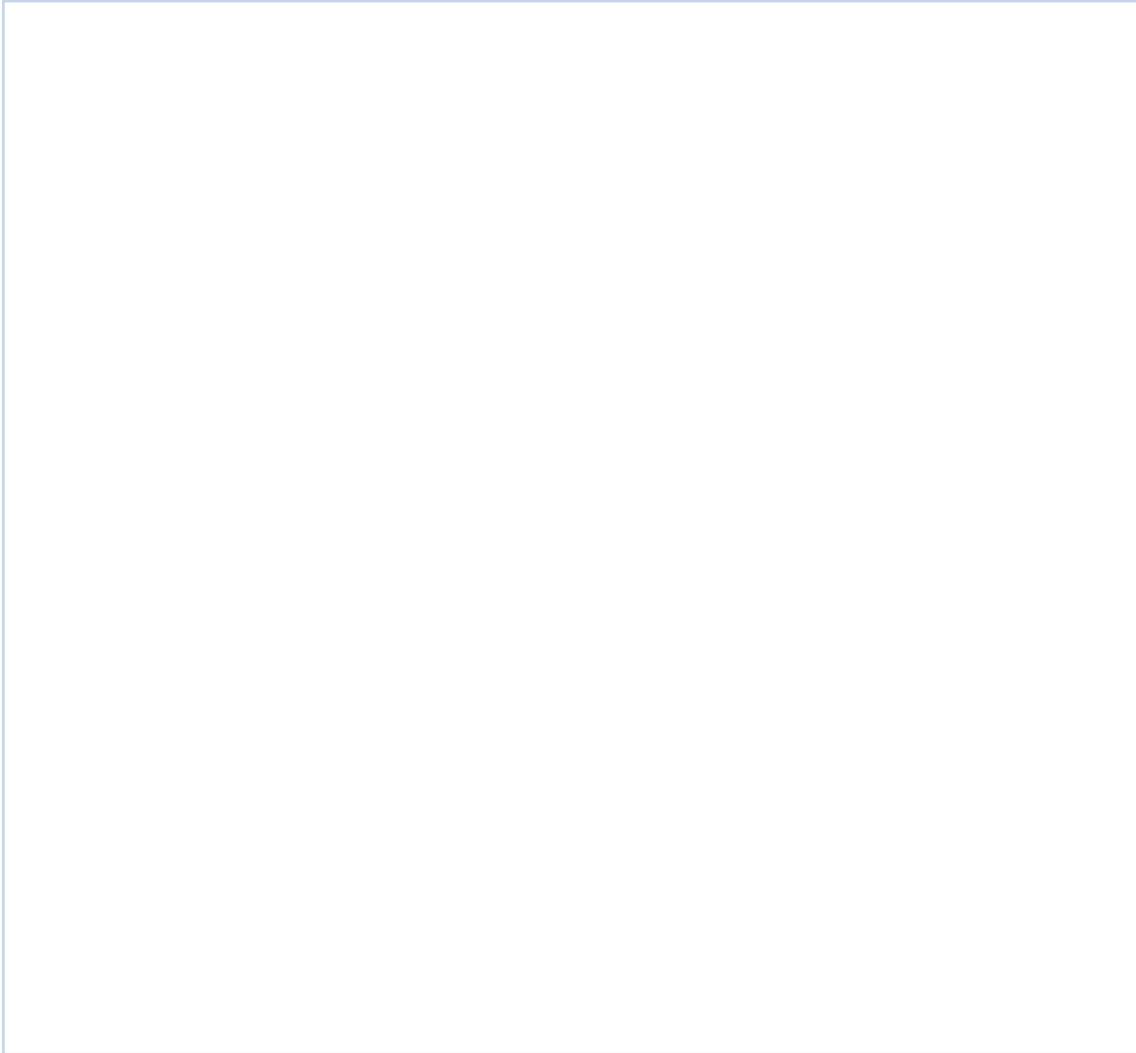
Typical work tasks include:

- researching a subject and story
- writing news stories and features in the publication's house style
- ensuring work is well written, accurate and submitted to deadline
- conducting interviews, either in person or over the phone
- attending seminars, conferences and fairs
- generating ideas for stories
- sourcing images to accompany written pieces
- meeting with colleagues to plan the content of the issue and the character of the publication
- keeping up to date with the trends and developments relating to the magazine's subject matter.

*continued ...*

*... continued*

Compile a list of questions to ask referees in line with the selection criteria listed in the job description.

A large, empty rectangular box with a thin blue border, intended for the student to write a list of questions to ask referees. The box is positioned below the instruction text and is currently blank.

## 3E

### Prepare a selection report and make recommendations to senior personnel for appointment

The selection process involves gathering a variety of information about applicants, evaluating each candidate for their suitability for the job and finally reaching a decision on who to extend a formal job offer to.

Each candidate should be evaluated on the information provided in their résumé, their performance during the interview and the information drawn from reference checks.

It is important to take your time to reach a decision. Avoid making on-the-spot or quick decisions. Reflect on the evaluation results over a day or two before proceeding with reference checks for the final candidates.

The panel evaluation may reveal a close match between multiple candidates. You may elect to conduct a second round of interviews or seek further references for the top candidates before making a final decision. Alternatively, it may become obvious that none of the candidates meet the requirements for the job and it may be necessary to re-advertise the job and begin the recruitment process again.



### Recommendation report

Once the selection panel members have agreed on a candidate, you can make a recommendation to the appropriate people. The recommendation can be an informal announcement, or you may need to follow a formal procedure in which you complete a 'Recommendation to appoint' form.

The relevant manager may have been a member of the selection panel; if not, inform them as soon as you have a selection to recommend. If you have employed a recruitment agency, the panel's chairperson usually informs the agency of the recommendation. The agency then completes the process by telling the successful and unsuccessful candidates the outcome, conducting any tests and offering the successful candidate the contract of employment.

Remember that the selection process must be legitimate and that you must show enough evidence to support the selection decisions about both the successful candidate and the unsuccessful candidates. The evidence must be accurate, justifiable and relevant.

It is important for HR purposes that you prepare a report in which you outline the process followed. The report will be useful if an unsuccessful candidate appeals the decision or wants more information about the process and the selection results.

Here is a list of some of the steps and processes that will need to be undertaken within the recommendation reporting process.

Steps and processes to be included in a recommendation report:

- Advertising methods used
- Key selection criteria
- The number of applications received
- The interview process
- The number of applicants short-listed
- The names and details of referees contacted
- The number of applicants interviewed
- The appointment recommended

## Formal job offer

Once you have decided on the successful candidate, extend a job offer to them. The purpose of the job offer is to inform the candidate of the selection decision, to discuss the details and conditions of the job and for the candidate to accept or decline the job offer. A job offer is generally issued before an employment contract is drawn up.

When all approvals are in place, the HR director will contact the recommended candidate to make a formal job offer.

Include the following information in the candidate's appointment folder:

- Candidate's completed application form
- Copies of candidate's qualification certificates
- Completed notes from three referees
- Candidate evaluation forms completed by the selection panel

## Example: recommendation to appoint form

Here is an example of a 'Recommendation to appoint' form.

*continued ...*

... continued

Selection method: Written application: Interview: Second interview: Aptitude test: Keyboard test: Other:
Number of short-listed applicants Name Suitability Order Referee reports used
Reason for recommendation:
Recommended starting salary:
Recommended starting date:

## Practice task 16

Use the internet or have a discussion with HR personnel to research tips and advice on how to select the right candidate.

What are the best ways to make the final decision and select a candidate? What do you need to consider?

# 3F

## Advise unsuccessful candidates of the outcome and respond to any queries

Inform all unsuccessful candidates of the outcome of the selection process. Organisations that fail to do this, or do not do it well, risk damaging their reputation as good employers.

While a candidate may not meet the specific requirements for the job this time, it is sensible to promote a favourable view of the organisation among the applicants, because there may be future job vacancies for which they would be suitable and for which you would wish them to apply.

Applicants and their families may be your customers as well as potential employees, so it makes business sense to treat them fairly and courteously.



### Advise unsuccessful candidates

The panel should agree in advance who is responsible for advising unsuccessful candidates about the outcome of the selection process. This is usually done by email and sometimes by telephone or letter.

Unsuccessful candidates should be contacted in a timely manner, preferably immediately following contact with the successful candidate. It is best to wait until the successful candidate has accepted the position in case they do not take up the position and a second candidate needs to be offered the position.

### Provide feedback

It is also common to offer feedback to unsuccessful candidates if they request it. A panel member needs to be nominated to provide constructive feedback to candidates if and when they contact the organisation.

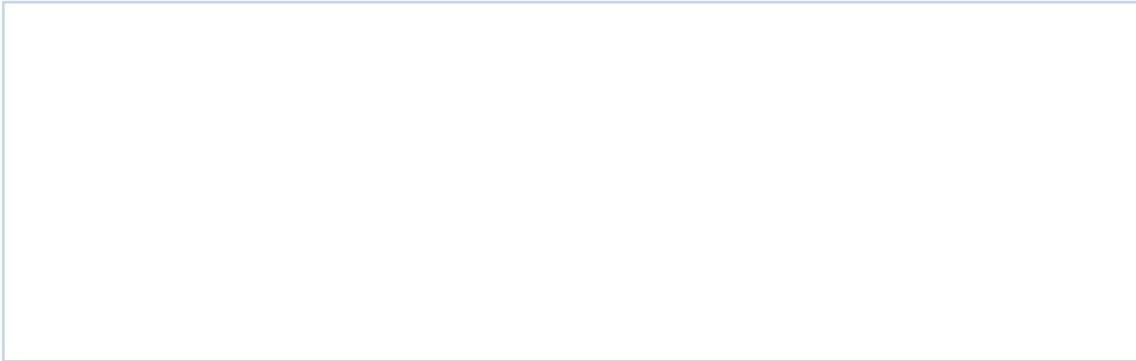
Feedback provided to applicants should be based on the information recorded during the selection process. Feedback should be specific to the person and honest.

Providing feedback can sometimes be difficult. Be constructive and balance the candidate's weaknesses with their strengths. Try to give positive feedback to unsuccessful candidates on any aspects they could reasonably improve for future success.

Failure to get one job does not necessarily mean unsuitability for other jobs within the organisation. Keep résumés or applications on file for future job matching.

## Practice task 17

How would you inform unsuccessful candidates about the outcomes of your selection process?



# 3G

## Secure the preferred candidate's agreement

The final stage of the selection process occurs when an offer of employment is made to the preferred candidate. When offering a job, be prepared to answer questions the candidate may have about the position and your organisation. You may also be required to negotiate terms and conditions of the job offer, such as salary and benefits.

To encourage the candidate to accept the position, present the job opportunity in the most positive light possible. Remember that a job offer is only considered accepted and secured when you receive a signed letter of acceptance from the candidate.



### Prepare an offer

Prepare the relevant information that needs to be communicated to the candidate. Inform the candidate of the job specifics and the terms and conditions that exist when accepting the job.

Relevant information for job offering includes the:

- job title
- conditions that apply to the offer
- terms of the offer salary (for example, work hours, benefits, entitlements)
- starting date
- probationary period
- action the candidate needs to take, such as returning a signed acceptance of the offer.

### Make an offer

Once the selection panel has made a recommendation for a candidate and the recommendation report has been signed by senior management, an offer of employment should be made to the preferred candidate as soon as possible.

## Make a verbal offer

A verbal offer is usually made over the phone. Call the candidate, introduce yourself and remind them of your organisation and the interview.

### During the call

- Inform the candidate that you would like to offer them the job.
- State some of the basic details, such as starting date and salary.
- Organise to communicate the specific details by email or post (it may be too overwhelming for the candidate to hear all the terms and conditions of the job over the phone, so just stick to the most important details).
- Use a positive tone to demonstrate your enthusiasm about having the candidate join your team.
- Explain the skills or traits the candidate possessed that most impressed the selection panel.
- Answer any questions the candidate has regarding the job offer (if the candidate requires time to consider the offer, propose to send them further information to assist them in their decision-making).

### Before ending the call

- Schedule another call to further discuss the offer.
- Establish another method by which the candidate will contact you, such as email or a meeting in person.

## Wait for the candidate to accept or decline the offer

After you have informed the candidate of the offer and provided them with the details in a written form, you must wait to see if they accept or decline the offer. Even if you have phoned the candidate, they must still sign a written job offer to legally accept the position.

It is common to state a deadline by which they must inform you of their decision. If the candidate accepts the offer, they must return a signed copy of the letter for the organisation's files.

If the offer is accepted, draw up an employment contract based on the information contained in the job offer. An employment contract is a legal document that consists of a written statement. It is required by law to be issued to an employee within two months of the date they start work.

If the candidate declines your offer of employment, reconvene with the selection panel to decide what action to take. Was there another notable candidate who would be suitable for the job? Will you be required to undertake the recruitment and selection process again?

## Inform relevant personnel

Once the candidate has signed the job offer and returned it to you, inform all relevant people in your organisation. This includes the HR department (which is responsible for drawing up the employment contract), the selection panel and any immediate managers or colleagues who need to know when a new team member will be joining the organisation.

### Example: a job offer letter

Here is an example of a job offer that shows how to structure the information.

#### Written job offer

Dear Susan Li,

We are pleased to confirm our offer of employment. Your employment will be with SunSet Enterprises under the following terms and conditions.

#### Position

Your functional job title will be Key Account Manager and you will be assigned to the Sales Department. Your appointment will be a full-time work contract.

#### Salary

You will receive a salary of \$65,000 per annum with a commission rate of 5% for all confirmed sales.

#### Probationary period

The first six months of your employment will be a probationary period. During this time, there will be a mutual notice period of two weeks.

#### Hours of work

Your official hours of work will be eight hours per day, to be worked between 9.00 am and 5.00 pm Monday to Friday. You may be expected to work outside these hours on a regular basis and to travel, both within Australia and overseas, on Company business. However, when you do so, you will not be eligible for payment of overtime. You agree that your total working hours may sometimes exceed 40 hours per week on average, calculated over a 17-week period.

#### Date of employment

If you accept this offer, please indicate the date you will be able to commence employment. By accepting this offer and commencing employment you represent to the Company that you will not be in breach of any such contractual obligation and you undertake not to breach any other contractual obligation that you owe to such entities.

#### Conditions of the offer

This offer is subject to:

- references in a form that is satisfactory to the Company
- a medical report in a form that is satisfactory to the Company.

If you have any queries regarding the contents of this letter, please contact Sarah Givencivic.

Please indicate your acceptance of the above terms and conditions by signing the attached copy of this letter and returning it to the HR department of SunSet Enterprises. On acceptance of this offer, you will be issued with a written employment contract that forms the terms and conditions of your employment.

Yours sincerely,

M Higgenbotham-Fraser

Mark Higgenbotham-Fraser  
SunSet Enterprises

## Practice task 18

Write a job offer for your own job or a job you have had in the past. Make sure you include all the details of the position, including start date, salary, probationary period, working hours, conditions of the offer and any other information.



# 3H

## Complete all necessary documentation

Hiring a new employee is a formal procedure. While you may have been busy conducting interviews, discussing candidates and contacting referees, remember to complete the necessary documentation before extending a job offer to the preferred candidate.

### Confidentiality and privacy requirements

In preparing selection process documentation, you need to observe your organisation's confidentiality and privacy requirements. These requirements are designed to protect the rights of employment candidates and staff in relation to the collection, use, disclosure, transmission, security and disposal of personal information.

Privacy rights and confidentiality in relation to personal and/or sensitive information must be upheld regardless of whether the information is stored and communicated through manual or electronic systems, or is communicated verbally. All appointed employees must be advised that they are entitled to access information on their personal records.

### Organisational documentation

Common documents that need to be completed are written job offers, employment contracts and appointment forms. Here is a list of relevant documents that may form part of the organisational documentation process.

#### Appointment letter

A letter that establishes, changes, maintains or concludes the relationship between an employee and employer.

#### Written job offer

A document that confirms the details of an offer of employment. The job offer letter includes details such as job description, reporting relationship, salary, bonus potential benefits and holiday entitlements.

#### Payroll form

A form used to gather employee bank account and taxation information for salary purposes.

### **Interview assessment form**

A form that enables selection panel members to assess the qualifications of individual candidates. The format provides a method for comparing the interviewers' impressions of various candidates.

### **Employment contract**

A written agreement specifying terms and conditions under which a person consents to perform certain duties as directed and controlled by an employer, in return for an agreed wage or salary.

### **Interview feedback form**

A feedback form that scores a candidate's performance during an interview. The main areas of evaluation are suitability for the job, knowledge of the subject and self-presentation.

### **Work permission for Australia**

A legal document that confirms a candidate's permission to work in Australia. This is a work permit, work visa, certificate of permanent residency, or certificate of Australian citizenship.

### **Declaration of criminal record**

An official record of the crimes that a person has committed attained through the police department in your state or territory. For employment purposes a 'Name Only' Police Certificate is used.

### **Interview notes**

The collected notes of a selection panel member made during and after candidate interviews. These may be stored for legal reasons.

## Example: appointment letter template

Here is an example of an appointment letter template that could be used when recruiting a new employee.

[Date]

[Name]

[Address]

Dear [new employee],

Re: Appointment to the position of [position title]

I am pleased to be able to advise you of your appointment to the position of [position title] within our organisation commencing on [day/date]. In that position you will report to [name and title].

During the period of your contract, you will be based at [location].

The appointment is a permanent, full-time position subject to the satisfactory completion of a [three/six month] probationary period commencing on [XX date] and concluding on [YY date] as discussed during your interview. During the probationary period, the employment can be terminated with one day's notice by either party.

Your employment may be terminated by the employer providing four weeks' notice or payment made in lieu thereof. You may terminate your employment by providing four weeks' notice. Your employment will be terminated summarily for any of the reasons listed in Appendix A attached to this letter of appointment.

The terms and conditions of your employment are regulated by the [XXX] Award and the [YYY] Agreement.

Consistent with the terms of the Award and the Agreement you will be classified as [type of worker] at Grade [XXX], which will mean that your gross annual salary will be [\$YYY].

In that position you will be required to work [XX] hours per fortnight between the hours of [start time] am and [finish time] pm Monday to Friday. If you are required to perform work outside the hours 7 am and 7 pm Monday to Friday, or on Saturday or Sunday, you will be paid at the appropriate overtime rates specified in the Award and/or Agreement. You should note that overtime must be authorised by your immediate supervisor.

You are required to attend an Induction Program at [time/day/date/location]. During the Induction Program, you will be provided with detailed information relating to the Work Health and Safety requirements and Code of Conduct. It is necessary for you to become fully aware of the details of both documents and you will be asked to sign a form indicating that you have read and understood both documents.

As salaries are paid fortnightly into a nominated bank account, you will be asked to complete the appropriate form providing details of your bank account in order to be paid.

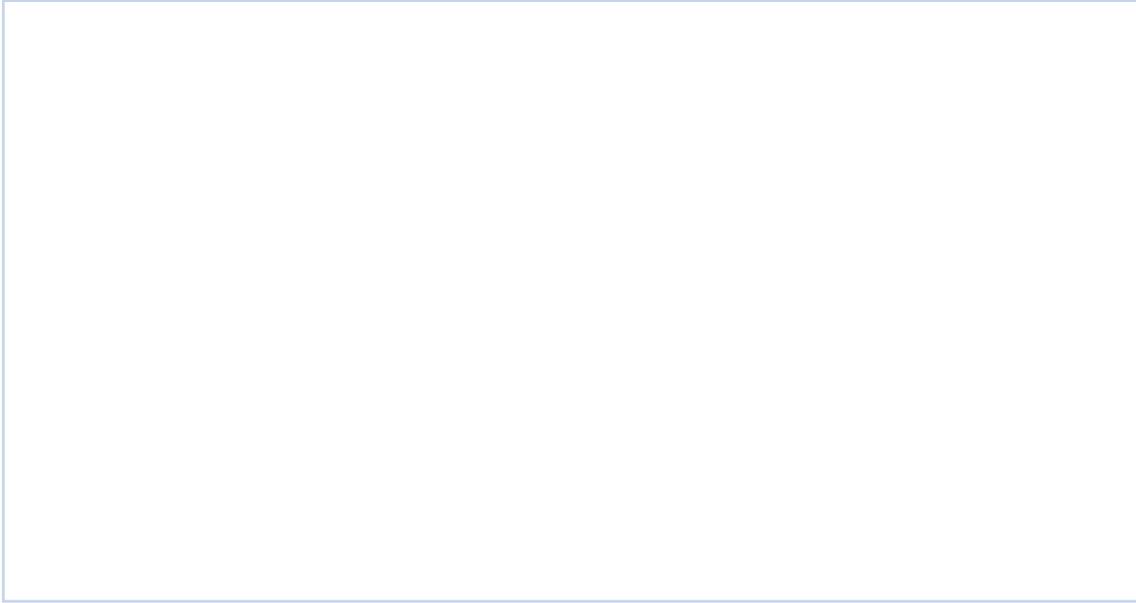
If you have any queries regarding any aspects of your appointment or the terms and conditions of your employment, please contact [contact person] on [phone number].

Yours faithfully,

[appropriate manager]

## Practice task 19

Find out your organisation's policies and procedures for selection documentation. What documents need to be completed to hire a new employee?



## Summary

1. Interview short-listed candidates to assess their skills and attributes in greater detail.
2. Ask candidates a variety of questions in the interview to evaluate each candidate's skills, knowledge and experience.
3. Assess each candidate directly after the interview using a candidate evaluation form.
4. Evaluate candidates in a panel discussion and correct any biases that are identified.
5. Rank candidates according to how well they meet the job-related criteria.
6. Conduct reference checks on preferred candidates to verify their work and performance history and help you select the most suitable candidate for the job.
7. Inform unsuccessful candidates in a timely manner.
8. Submit a formal report to management outlining the panel's recommendations for the appointment.
9. Extend a job offer and provide the preferred candidate with the terms and conditions of the position.
10. Ensure confidentiality and privacy requirements are observed when completing and storing employment documentation.

## Learning checkpoint 3

### Support the selection process

This learning checkpoint allows you to review your skills and knowledge in supporting the selection process.

#### Part A

1. In the employee life cycle, what stages come immediately before and after the selection stage?

2. When and why do you use a candidate evaluation form in the selection process?

3. What is bias and when might it occur in the selection process? Explain in one paragraph.

4. Should you inform candidates whether they have been successful or unsuccessful at the end of each interview? Explain your response.

5. When do you need to draw up an employment contract for a new employee?

## Part B

Working in groups of three to six, conduct interviews with at least three candidates for the following position. Decide who will be part of the selection panel and who will be a candidate. If you are in small groups, some may have to play both roles. Ensure every person in the group has the opportunity to be a member of the selection panel and complete all selection stages.

### Job: Primary school teacher

A primary school teacher position is available at a local primary school. The successful candidate will develop schemes of work and lesson plans in line with curriculum objectives. They must also facilitate learning by establishing a relationship with pupils and by organising learning resources and the classroom learning environment.

The main tasks and responsibilities of the position include:

- teaching all areas of the primary curriculum
- taking responsibility for the progress of a class of primary-age pupils
- organising the classroom and learning resources to create a positive learning environment
- planning, preparing and presenting lessons that cater for the needs of the whole ability range within their class
- motivating pupils with enthusiastic, imaginative presentation
- maintaining discipline
- meeting requirements for the assessment and recording of pupils' development
- providing feedback to parents on a pupil's progress at parents' evenings and other meetings
- coordinating activities and resources within a specific area of the curriculum, and supporting colleagues in the delivery of this specialist area
- working with others to plan and coordinate work
- staying up to date with changes and developments in the structure of the curriculum
- taking part in school events and activities that may take place on weekends or in the evening
- liaising with colleagues and working flexibly.

As part of the interview process, you must complete each of the following six stages, recording each one in a journal:

1. Determine the selection criteria for the position.
2. Come up with a procedure for the interviews that includes 10 interview questions to assess the candidates' ability to fulfil the selection criteria.
3. Interview three people for the position.
4. Fill in a candidate evaluation form for each candidate.
5. Rank the candidates and negotiate with the selection panel to determine the preferred candidate.
6. Identify any bias or deviations from the agreed interview procedure and correct them.

You will be observed and assessed on your contribution to the entire interview process.



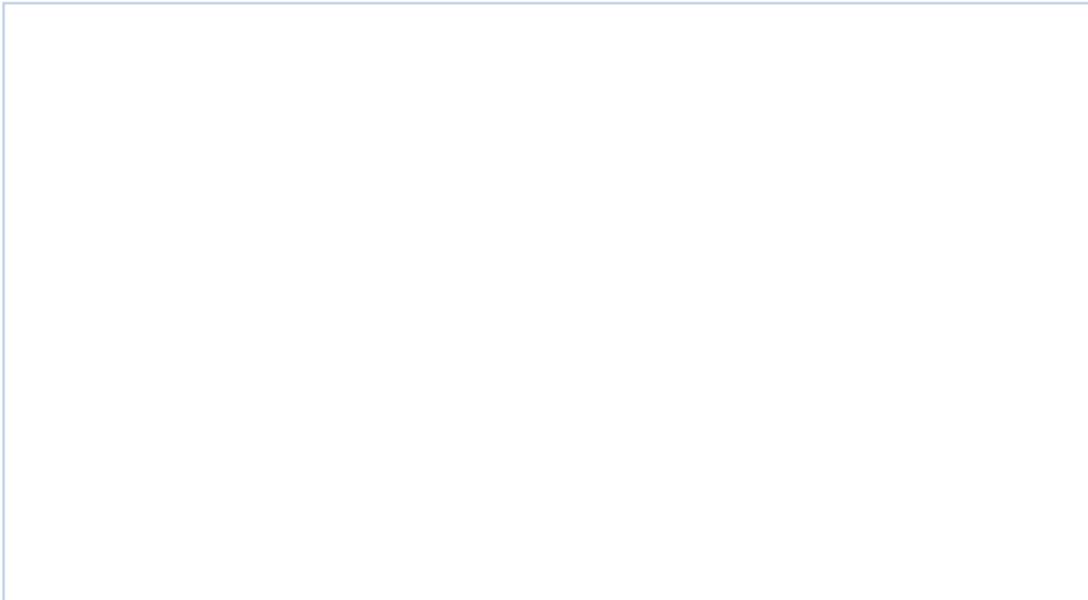
## Part C

Based on the interview process you conducted for Part B, prepare the following documents individually:

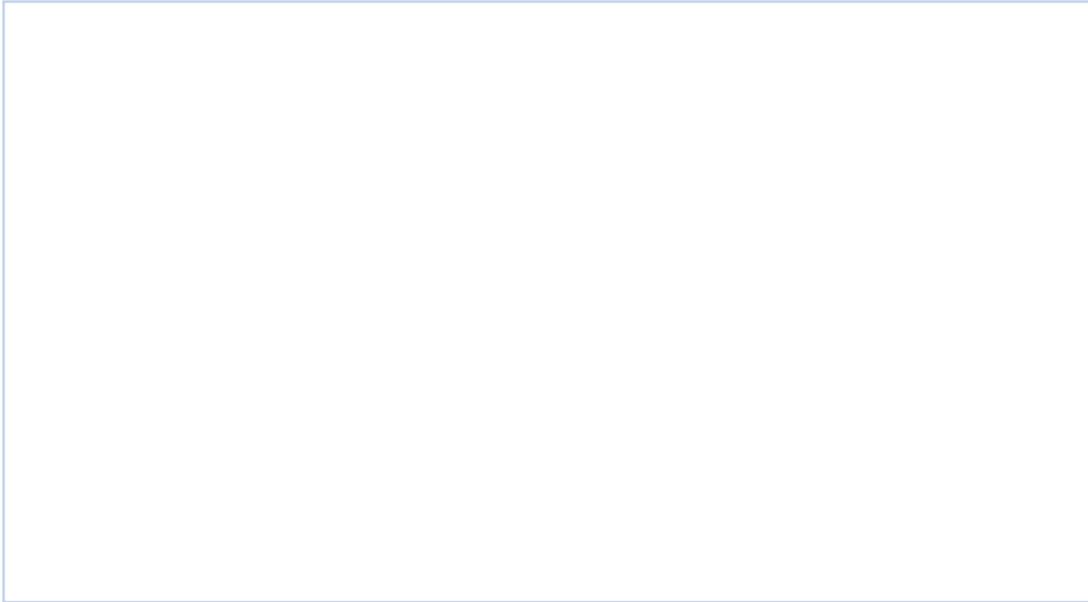
1. Write a letter to send to the unsuccessful candidates.



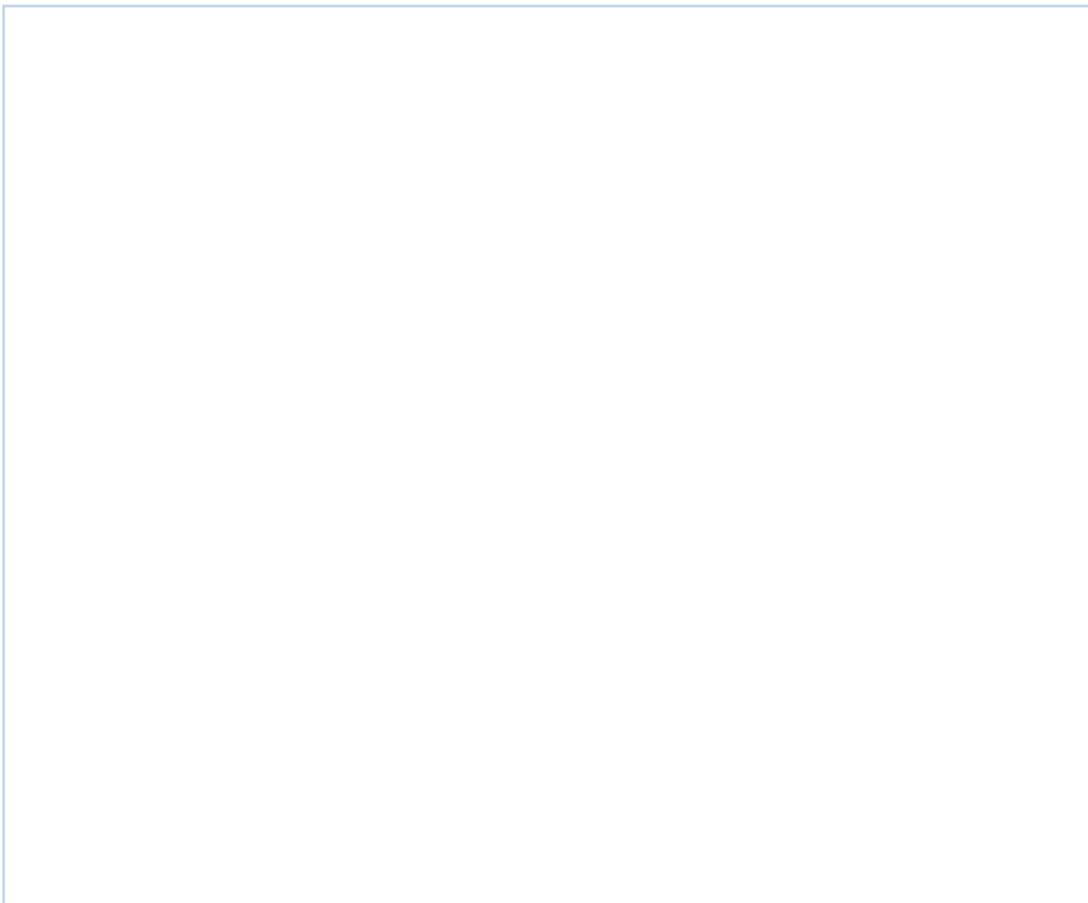
2. Make a list of at least seven questions to ask during a reference check of your preferred candidate.



3. Prepare a recommendation letter for your preferred candidate to submit to management.



4. Prepare a written job offer for the position.



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## Topic 4

# Induct the successful candidate

The arrival of a new employee requires you to prepare the workplace by completing all the necessary paperwork and administrative requirements, advising staff members and organising the induction program. The induction program is very important as it builds a good rapport with the new employee, communicates key information and encourages employee retention and development.

In this topic you will learn how to:

- 4A Provide the successful candidate with an employment contract and other documentation
- 4B Advise the manager and work team of the new appointment
- 4C Make necessary administrative arrangements for the new employee
- 4D Arrange the successful candidate's induction

## 4A

## Provide the successful candidate with an employment contract and other documentation

When a job offer is accepted by a candidate, the necessary documentation must be organised. The main document to be organised is the employment contract, which states all terms and conditions of the position.

The employment contract is the basis of the employment relationship and therefore should clearly set out the obligations of each party and the terms and conditions that will apply to that relationship. Other documents that may also need to be organised are payroll administration forms, tax declaration forms and superannuation forms.



## Provide an employment contract

An employment contract is an agreement between an employee and employer that specifies the terms and conditions of employment. It sets out the rights, responsibilities and duties for the new employee. By agreeing to the employment contract, the new employee is accepting the terms offered.

### Example: employment contract

Here is an example of an employment contract. It illustrates the various details, terms and conditions that need to be communicated in the contract.

<b>Contract of employment</b>
<p><b>Employment details</b></p> <p>Employer: (insert company name)</p> <p>Position: (insert job title)</p> <p>This employment agreement is between (insert company name) and (insert employee name).</p> <p>For good consideration, (the company) employs (the employee on the following terms and conditions.</p>
<p><b>Internal reporting</b></p> <p>(Insert name of the person to whom the employee reports)</p>
<p><b>Location of position</b></p> <p>Your current location is: (insert location of position).</p>
<p><b>Duties and responsibilities</b></p> <p>The Employee shall be employed in the capacity of (insert position), the current duties and responsibilities of which are set out in Schedule 'A' annexed hereto and forming part of this agreement.</p>

*continued ...*

... continued

<p><b>Salary and benefits</b></p> <p>Your current remuneration is (insert base salary information) per annum, plus the Company Superannuation Guarantee Charge. This figure includes annual leave loading. (If your organisation pays annual leave loading, please include this).</p> <p>Payment is made directly into a nominated bank account. Please provide details of your bank account.</p> <p>Name of institution:</p> <p>BSB number:</p> <p>Account number:</p> <p>Name of account:</p> <p>Please also provide your Australian tax file number</p> <p>TFN:</p> <p>Salary payment is made (insert frequency) on the (insert date of salary payment) (or the business day nearest to such date) of each (insert frequency), for that (insert frequency).</p> <p>The Company's Superannuation Guarantee Charge contribution is currently 9.5% of the salary quoted above. An outline of the appropriate Plan is available from the Finance Department.</p>
<p><b>Salary review</b></p> <p>Salaries are reviewed (insert time or month of annual review).</p>
<p><b>Annual leave</b></p> <p>Your annual leave provision is 20 working days per annum. Except by prior arrangement with the Managing Director, annual leave must be taken within six months of the end of the year in which it is accrued.</p>
<p><b>Personal leave</b></p> <p>Your paid personal leave provision is 10 days per annum. The Company may at its discretion extend this allowance.</p>
<p><b>Hours of work</b></p> <p>You are required to work a minimum of (insert hours of work).</p>
<p><b>Overtime</b></p> <p>In exceptional circumstances, you may be eligible for paid overtime, at the rate shown in the published Company Overtime Policy, for work carried out beyond usual hours.</p>
<p><b>Notice period</b></p> <p>The period of notice required from you to terminate employment with the Company during your probation period is one week, and thereafter one month. With the exception below, the Company will provide the same period to terminate your employment. Notice must be given in writing.</p> <p>Your employment may be terminated by the Company with no notice period if at any time you commit a serious or persistent breach of this agreement or you are guilty of any serious misconduct or wilful neglect in performing your duties.</p>
<p><b>Confidentiality</b></p> <p>You agree that for the continuance of this agreement, you will not disclose any confidential information to any person, firm or corporation.</p>

*continued ...*

... continued

#### Policies and procedures

This Statement provides a summary of the main terms and conditions of your employment with (insert company name). Your attention is also drawn to the policies and procedures manual, which describes various other employment practices in more detail.

#### Acceptance

I accept and agree to the above statement of my terms and conditions of employment.

Name:

Signed:

Date:

## Acceptance

The employment contract is drawn up as soon as the candidate accepts and signs the job offer. New employees should read through the contract thoroughly and sign it once they are satisfied with the terms and conditions.

All new employees are entitled to a written statement of their main employment terms within two months of starting work. It is your organisation's responsibility to ensure this documentation is prepared and filed correctly. It is generally the task of the HR department to manage all employment-related documentation.



## Employment contract

Employment contracts are important legal documents. They are generally prepared by the HR department according to strict organisational policies. Even if you do not prepare employment contracts yourself in your job, it is important that you understand how to navigate their contents.

The employment contract is an agreement that sets out the duties of the employee and employer, and provides the employer with the opportunity to clarify the relationship by setting out specific terms. The terms of an employment contract will vary by state or territory and by type of employment.



## Common terms and conditions

Here is a list of the common terms and conditions in employment contracts.

<b>Identification of parties</b>
Details of the employer and employee (full name and address)
<b>Employment contract start date</b>
Date for when the contract commences
<b>Job title and description</b>
The title and description of the job
<b>Place of work</b>
Location where the employee will work
<b>Hours of work</b>
Hours per week that the employee will work, including any additional hours that may be required
<b>Overtime and time-in-lieu</b>
The organisation's policy for compensating overtime work and time-in-lieu options
<b>Probationary period</b>
The trial period for the employee, if required; conditions of the trial period must also be stated, such as a short notice period or action taken if the employee does not fulfil expectations
<b>Salary and annual pay increments</b>
Salary, applicable bonuses or commission payments, and expected annual pay increments; specifies when payment is made

## Other terms and conditions

The employment contract may also include information on the following areas.

### Performance review

When the employee will receive their first performance review and the expected timing of all subsequent regular reviews

### Expenses

Clarifying which work-related expenses the employer will cover and when the employee will be reimbursed

### Sickness

Applicable time frames for when an employee must inform the employer that they will be unable to attend work; this section also states when a doctor's certificate is required

### Leave

Policy regarding employee leave options, citing all conditions such as time restrictions and salary

### Superannuation

Superannuation processes and whether the employee will be included within specific schemes

### Notice

How notices of action must be sent and received by each party – resignation on the part of the employee or termination of contract by the employer; the notice period required by both parties must be stated

This term should also provide a detailed list of actions that constitute gross misconduct allowing the employer to dismiss without giving notice

### Code of conduct

Summary of the organisation's code of conduct and where the employee can access all organisational policies and procedures

## Organisational policy and employment documents

An essential task is to ensure all documentation related to the recruitment process is filed appropriately. Follow your organisation's procedures.

The organisational procedures may include:

- filing the job advertisement with a summary of the procedure and results
- creating a personnel file for the successful candidate and placing their application, résumé, referee reports, offer of employment, acceptance and employment contract in it
- keeping unsuccessful applications in a file for future consideration
- entering the successful applicant's details on the human resources information system/database.

## Employment documentation

Employment contracts strictly follow organisational policy because of their legal significance. They need to be written correctly, standardised across the organisation and, where necessary, uphold legal requirements.

When you are organising and providing an employment contract for a new employee, check and adhere to all policies and procedures that relate to an employee appointment.

Here is a summary of the documents associated with a new appointment.

### Role outline

A role outline is a detailed description of the duties and responsibilities that make up the job.

### Selection criteria

The selection criteria are a list of the personal qualities, skills, abilities, knowledge and qualifications the employee needs to perform the job effectively.

### Agreement of employment

An agreement of employment is a detailed description of agreement entered into between the employer and the employee at the time the employee is hired. It must outline the exact nature of their business relationship, specifically what compensation the employee will receive in exchange for specific work performed.

### Copies of relevant awards

Awards are legal documents that outline the minimum conditions and entitlements an employee must receive for working in a particular industry or doing a certain job. Awards and enterprise agreements also set out the general responsibilities of the employee and the employer.

When a candidate accepts a job offer, you must inform them of which award or enterprise agreement they are working under.

### Code of conduct for staff

An organisational code of conduct is a set of rules outlining the expectations and responsibilities of proper practice for every person employed by the organisation. The rules and practices are considered legally binding and must be observed by all.

The code of conduct provides guidelines for a range of ethical and moral issues that may affect employees from time to time, such as workplace harassment and fair and equitable treatment. Codes of conduct are generally set out in a formal document readily available to all employees.

### Confidentiality agreement

A confidentiality agreement is a legal contract between the employer and employee that outlines confidential material, knowledge or information that the parties wish to share with one another, but restrict access to by third-parties such as business competitors or the media.

It is a contract through which the employee agrees not to disclose any information covered by the agreement. Confidentiality agreements define what information is to be held confidential; the term (in years) the agreement is binding and the employee's obligations regarding the confidential information. Information related to the organisation's clients, financial position and intellectual property is usually covered in this agreement.

### Reporting requirements

Reporting requirements refer to the information an organisation must report to the government to comply with federal or state law. The information an organisation must report on behalf of its employees generally includes tax, superannuation and workers compensation.

## Additional documentation for new employees

In addition to providing a new employee with an employment contract, there may be additional documents you need to prepare for the employee to complete. This will vary from organisation to organisation depending on administration procedures. Check with the relevant person or HR department in your organisation.

Forms that need to be passed on to new employees relate to:

- payroll administration
- tax declaration
- superannuation.

## Example: employee details form

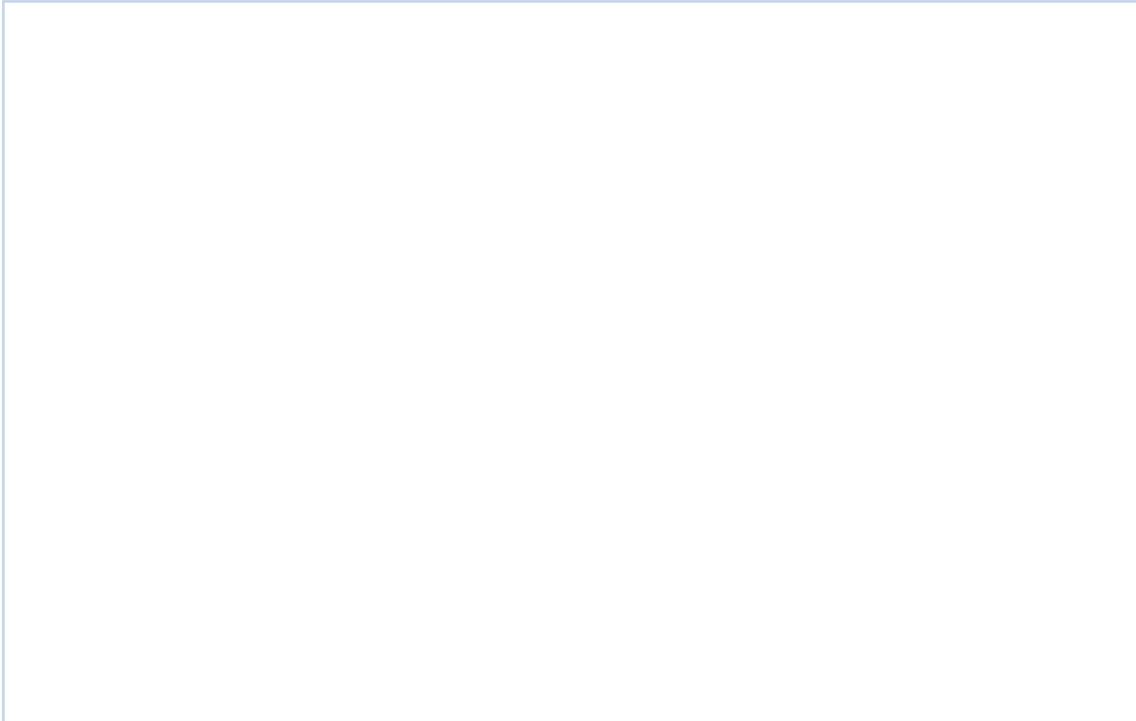
Here is an example of an employee details form. It gathers the new employee's personal and payroll information. This information is then entered on the HR information system.

<b>Employee details form</b>	
<b>Personal details</b>	
Name	
Position	
Department	
Date of birth	
Gender	
Address	
Mobile number	
Email address	
Emergency contact	
<b>Payroll details</b>	
Pay basis (hourly/salary)	
Pay rate	
Pay frequency	
Start date	
<b>Tax and superannuation details</b>	
Superannuation	Provided superannuation form?
Tax	Provided tax file number declaration form?
<b>Banking details</b>	
Bank	
Branch address	
Name of account holder	
BSB/branch no.	
Account no.	
<b>Additional details</b>	
Form completed by	
Date	

## Practice task 20

Access your employment contract and look through the terms and conditions. If you are not currently employed, research with friends, family or on the Internet to find a completed employment contract.

What terms and conditions are included in the employment contract? What terms and conditions appear to be excluded?



## 4B

### Advise the manager and work team of the new appointment

Before the induction process begins, you need to inform the relevant staff in your organisation of the new appointment. You can determine who needs to be informed about the new appointment by thinking broadly about the job and the structure of your organisation.

#### Advise relevant staff of the new appointment

The people that you will inform about the new appointment may include immediate manager/s, immediate supervisor/s, team members, colleagues, administration staff, receptionist/s and security staff.

Answering the following questions may help you identify people you may have overlooked:

- Who will the new employee report to?
- Where will the new employee sit? Who else works in this area?
- Are there any colleagues who are not located at this office who also need to be informed of the appointment?
- Do you have shared facilities? Who uses these facilities and should be informed of a new employee?
- Are there any part-time or casual employees who may not have heard any formal introductions, but also need to be informed?
- Do any ground or security staff need to know about the new employee?

#### When the new employee begins

Inform all staff that a new employee is joining the organisation. Include the name of the new employee, the department they will be joining and the commencement date so staff are prepared and welcoming.

Some staff may require more detailed information about the new employee. For example, immediate managers may need more information about the new employee, employment contract or job. Security staff may need to be informed of the new employee's work hours, staff identification or building access rights.

Determine the information about the new employee that needs to be provided to appropriate staff members. Answer any questions staff members have about the new employee. Share only appropriate information with relevant parties and direct any questions you cannot answer to people who can.



## Communication methods

There are several ways you can inform staff about a new employee who is joining the organisation. Check your organisation's policies and procedures regarding new employees to see if there are any standard procedures to follow in announcing a new member of staff.

Most organisations do not have strict procedures for introducing new employees. If this is the case in your workplace, you will need to decide the best way to pass on the essential information about the new appointment.

Possible ways to inform personnel are by email, during a meeting, by telephone, in person, in the organisation's newsletter, on the organisation's intranet and on a noticeboard. You may have to use a combination of these methods to suit different situations and availability of staff. For example, if you decide to inform staff during your weekly department meeting, some staff members may be away on business and will need to be informed by email instead. If the new employee's manager requires more information about the new appointment than other personnel, you may need to speak with them directly and pass over relevant documents such as the job description or new employee's résumé.



In many cases, it will be your responsibility to decide who needs to be informed, what information you need to provide and how you will do this.

## Practice task 21

Read the scenario, then complete the task that follows.

### Scenario

You receive an email from your boss about the arrival of a new sales manager to your company, Blush Inc.

To: YOU

From: CEO

Subject: Please inform company about appointment of Mr Kaslak

Hi,

As you know, Mr Kaslak has accepted our job offer and will be joining Blush Inc. next week as the sales Manager. Given that our company only has 30 people, I would like everyone informed about Mr Kaslak's arrival so he is welcomed into our organisation.

Mr Kaslak will be replacing Melanie Heckell, who is moving into the marketing department. All members of the sales team will want to hear about Mr Kaslak's background. I suspect they will also have questions regarding this appointment, which I will be happy to address prior to Mr Kaslak's arrival. Perhaps we should schedule a meeting.

Please also remember that the CFO is away sick and will need to be informed.

Please ensure that everyone is aware of Mr Kaslak, his position in the company and his arrival date.

Kind regards,  
Shelly Blush

Write a plan for how you will inform the staff members of Blush Inc. about Mr Kaslak's appointment. Include how you will inform the different employees, what you will tell them and what you will do with the sales team.

# 4C

## Make necessary administrative arrangements for the new employee

There are a number of administrative issues that need to be organised before the induction of a new employee, such as organising all employment documentation and preparing induction activities.

### Prepare documents

The employee needs to sign their employment contract prior to commencement. You need to set up access to the organisation's intranet or departmental databases, depending on which area the employee is joining.

The tax file number (TFN) declaration form is compulsory and must be signed within 30 days of an employee starting work. This form clearly documents information relating to tax and other deductions, including types of deductions to be taken from a person's pay. It also documents the employee's tax file number and personal details. You can access the PDF version of the TFN declaration form on the Australian Tax Office (ATO) website at: [www.ato.gov.au](http://www.ato.gov.au). This is merely a sample document for you to look at. Your organisation must order and complete the paper copy provided by the ATO when a new employee begins work.

It is the employee's right to nominate a fund for the compulsory employer's superannuation contribution. To designate which fund their superannuation contributions will be paid to, the employee must complete the standard choice superannuation form supplied by the ATO. You can also access this form online at the ATO's website.

Other documents to be completed may include:

- a direct credit of salary to bank account form (if appropriate)
- personal details, including home and emergency contact details
- contractual and corporate agreements
- employee time data (work hours or time cards).

### Communicate with new employees

There are numerous ways of passing on information to new staff. How you do this depends on the size of the organisation, the nature of its business, where people are located, the type of employees and the available technology. For example, an organisation with branch offices may need to plan its communication strategies carefully to ensure no-one is excluded from the information stream. In this case, email and intranet facilities are appropriate ways of keeping all people informed at the same time. Similarly, organisations with many part-time or shift workers need to make sure everyone is included when a message or other information needs to be relayed to all staff.



## Written and verbal communication

Written information may be packaged in an induction kit, sent by email, posted on the intranet, and/or presented in weekly in-house bulletins.

Programs may be prepared to pass on information verbally with opportunities for questions and feedback, such as an induction program, information sessions, regular meetings of all staff and training sessions.

There may be occasions when it is more appropriate to have a one-on-one meeting to discuss a concern with the person involved.

### **Tips for communicating in writing**

- Written information should be presented in plain English.
- Avoid jargon, technical language or acronyms unless they are clearly explained.
- Think of your audience; for example, people with language difficulties or unfamiliar with the special words and terms associated with the industry you are working in.
- Prepare a draft of the information to circulate and obtain feedback from others to identify any spelling, punctuation or grammatical errors.
- Write logically so the message is easy to understand.
- Use dot points to highlight important facts.
- Do not provide too much information, as information overload can contribute to staff losing sight of the main message.
- Remember that follow-up information can always be supplied.

## Payroll information

When a new staff member is employed, you need to inform those responsible for payroll of their details, including a copy of their employment contract/award specifying their salary, other benefits and the hours worked per week.

You must also include their tax file number declaration form, notification of where their superannuation is to be placed, and their bank account details for direct credit of salary.

In addition, there may be details of deductions, such as their voluntary superannuation contribution, HECS fees and union fees. Identify the various deductions that need to be addressed for each employee and make sure they have been documented and filed.

From time to time, employees' circumstances may change, resulting in a change to their pay. Make sure employees understand the procedure they must follow for notifying HR of changes. When you are advised of the situation, you must immediately notify the appropriate personnel.

Some circumstances that may need payroll updates are:

- taking annual leave
- a pay increase
- an increase in an employee's voluntary superannuation contribution
- a decision to salary sacrifice
- the deduction of HECS fees
- payment of a travel or accommodation allowance
- payment of overtime
- a court notice requesting a specific amount be deducted from their pay
- the granting of additional benefits, such as a car allowance.

## Practice task 22

Imagine you have been asked to prepare the documentation for a new employee starting at your organisation.

1. List the documentation you need to prepare for the new employee, including details of when and how the employee must return each document.

2. What method would you use to communicate information about these documents to the new employee? Explain your answer.

3. What information will need to be entered on the HR information system?

## 4D

## Arrange the successful candidate's induction

The final stage of the recruitment, selection and induction process is welcoming your new employee into the organisation. Once an employee has been inducted, this cycle is considered complete.

Induction is the process of introducing new employees into an organisation and preparing them for the requirements and expectations of their new job. Induction includes orientating and training the employee in the culture, structure and relationships within your organisation.



### Elements of an induction program

On a new appointee's first day at work, the HR manager usually asks them to sign a number of documents if they have not already been given them; for example, a superannuation form and a personal form for recording details such as home and emergency contact phone numbers.

When a new employee begins work, there is much for them to learn, from when specific meetings are held to new computer programs and where they can eat their lunch. Induction programs aim to introduce a lot of this information to the employee.

An induction program should include the development of theoretical and practical skills required for the job as well as foster interaction with other employees within the organisation. It is essential that during this time, new employees are provided with sufficient information about the responsibilities, rules, entitlements, business goals and desired outcomes of the organisation.

When new employees commence work, the organisation usually arranges an induction program to introduce them to their workplace and colleagues, and to familiarise them with their role and responsibilities.

Some inductions are informal and last about an hour, whereas others have a highly structured pattern, involve other staff members and last a week or more.

## Induction program: the '8-8-8 rule'

Many organisations have developed what is known as the '8-8-8 rule'; that is, they have prepared a list of the things they must cover with their new employees during the first eight hours, which is the first day; the first eight days; and the first eight months. By developing this list, they have a framework against which they can benchmark and measure achievements for both themselves and the employee. If you use this type of induction system, you are more likely to retain newly hired staff.

Here is an example of a typical '8-8-8' plan.

### The first eight hours

Employees are:

- meeting colleagues
- familiarising themselves with the office layout and their area
- signing relevant documents
- learning about their rights and responsibilities
- understanding the WHS requirements.

### The first eight days

Employees are:

- being introduced to their work activities and specific job tasks
- seeing the relevance of their work to the organisation as a whole
- understanding the organisation's policies and procedures.

### The first eight months

Employees are:

- developing a checklist to show how they are using their skills and knowledge
- measuring how they are contributing to the organisation
- gathering feedback based on physical evidence, observation and third-party reports.

## Plan the induction

An induction program is a process used to welcome new employees into an organisation and prepare them for their new role. It is best to organise some elements of the induction program ahead of time.

Use the following guidelines for planning the induction:

- Inform colleagues of the new addition to your team.
- Organise induction starter packs.
- Designate a 'buddy' who can help integrate the new employee into their work environment.
- Contact the new employee to discuss dates, venues and requirements for the upcoming induction program.
- Organise other staff members to be involved in the induction process and advise relevant staff of the new employee's arrival date.
- Obtain a staff ID number and building keys.
- Prepare the new employee's work area including office supplies, technological requirements (computer, email, software) and telephones.
- Add the new employee's name to the staff directory, website or other relevant areas.
- Set up an email account for the new employee.
- Schedule any training the new employee requires.
- Inform the department receptionist of the employee's arrival time.

## Induction kit

HR personnel are usually responsible for preparing an induction kit to give the new employee. If your organisation has an induction kit, ensure it is kept up to date so it is ready when new employees are appointed. Confirm that all the forms and lists contained in it are current. If your organisation has not developed an induction kit, prepare one in consultation with your supervisor.

The kit may include the following documents:

- An organisational chart that includes details of the staff members and their titles, roles and responsibilities
- A plan that includes the office layout and the building's fire exits
- A brief history and background of the organisation, including its business operations, successes and competitors
- A policies and procedures manual, including leave provisions and information about expected behaviour in the workplace
- Information about specific programs for areas such as work health and safety and the environment
- Promotional material
- A sample of the organisation's latest newsletter

## Induction session

The induction session is complementary to the information contained in the induction kit. Induction sessions are important for both the new employee and the organisation. They are an opportunity to discuss the nature of the business in more detail and to explain where the new employee fits in and for the employee to decide whether their decision to take the job was the correct one. They are also a chance for the organisation to demonstrate its professionalism and effectiveness. A comprehensive, well-designed induction program can be mutually beneficial.

An induction session should include the following:

- A tour of the new employee's office, including a visit to its amenities and pointing out where equipment is located
- An introduction to all the relevant staff members
- A discussion about each person's or department's role and responsibilities
- An overview of the organisation and the nature of the organisation's business
- A detailed discussion about the department, section or area that the employee is to work in and the job requirements involved
- A detailed discussion of the organisation's policies and procedures for working conditions and behaviour
- The employee's rights and responsibilities, including legal and compliance issues for the workplace
- Policies and procedures for WHS
- Procedures for taking care of the work environment
- Specific job-role training, including how to use specific software and access company email

## Induction preparation

If you are preparing an induction session, allocate time to specific people to discuss various aspects of the organisation. Prepare a timetable so everyone knows when it is their turn to explain something to the new employee.

Every organisation must decide what information to cover during the induction period and what information can be covered at a later date. Consequently, induction programs vary in length and content depending on the organisation. The content of an induction will also vary according to the individual's level of knowledge and experience.



It is helpful to involve a number of staff in the induction process. It is important for the new employee to interact with various staff members during the induction process so they can feel comfortable within the organisation. For example, the new employee's manager is likely to be the best person to introduce the job and undertake job-specific training, while a colleague or team member may be best to conduct the office tour.

Additionally, it is important that the new employee knows exactly who they can ask for further information about the job role and the organisation after the induction process has finished.

## Timing of induction

The induction process should begin on the first day a new employee starts at an organisation. Delaying the induction may lead to the employee feeling uncomfortable, unsure about the job role and uncertain of how the organisation functions.

Many organisations have also developed computer-based training programs to be completed by new employees prior to or during the induction period. These programs generally include an introduction to the company, an overview of important policies and procedures, and job training for the specific role. This allows the employee to read the information in their own time. Computer-based programs are a good way to communicate a lot of information to many incoming employees and save time and resources.



### Example: induction checklist

Here is an example of an induction checklist. It shows some different elements of an induction program and how they are ordered.

Induction checklist	
Employee name:	
Employment date:	
Position/job:	
Manager/supervisor:	
Department:	
Section:	
General induction: Day 1	
<input type="checkbox"/>	Welcome the new employee.
<input type="checkbox"/>	Introduce the new employee to their co-workers, senior management and other key staff.
<input type="checkbox"/>	Discuss the roles of key staff and explain key reporting relationships to the new employee.
<input type="checkbox"/>	Provide a tour of the workplace, including offices, equipment, emergency exits, kitchen and toilets. It may also be helpful to provide directions to local cafés and public transport.
<input type="checkbox"/>	Give the employee some light reading on the organisation.
<input type="checkbox"/>	Provide a detailed explanation of position, based on current and expected results.
<input type="checkbox"/>	Explain why the position is important and how it relates to others in the department and to the organisation.

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<input type="checkbox"/>	Discuss the organisation's policies and procedures, codes of conduct and employment terms and conditions, such as probationary details, annual and personal leave entitlements.
<input type="checkbox"/>	Explain payroll including pay arrangements, superannuation and taxation.
<input type="checkbox"/>	Explain health and safety for the workplace including WHS policy and procedures, roles and responsibilities for health and safety, incident reporting procedures and the workers compensation claims process.
<input type="checkbox"/>	Explain security for office buildings, personal belongings and cash.
<input type="checkbox"/>	Review the main elements of the induction program including work practices and procedures, answer any questions and repeat any training if needed.
<input type="checkbox"/>	Have an informal discussion before the new employee leaves after Day 1, and ask for their first impressions of the organisation.

## Benefits of an induction program

First impressions are important. If an employee feels welcome in a new organisation, this will lead to greater loyalty to the job role and company. Induction programs play an essential role in the socialisation of a new employee into an organisation. These programs clarify expectations and responsibilities, and help foster a positive attitude and commitment to the organisation. A good induction program can increase productivity and reduce short-term turnover of staff.

Additionally, induction is an essential part of employee performance and development, areas that are looked at further along in the employee life cycle. An induction program contributes to a positive workplace environment by supporting and engaging new employees and providing them with ample ground to succeed in their role.

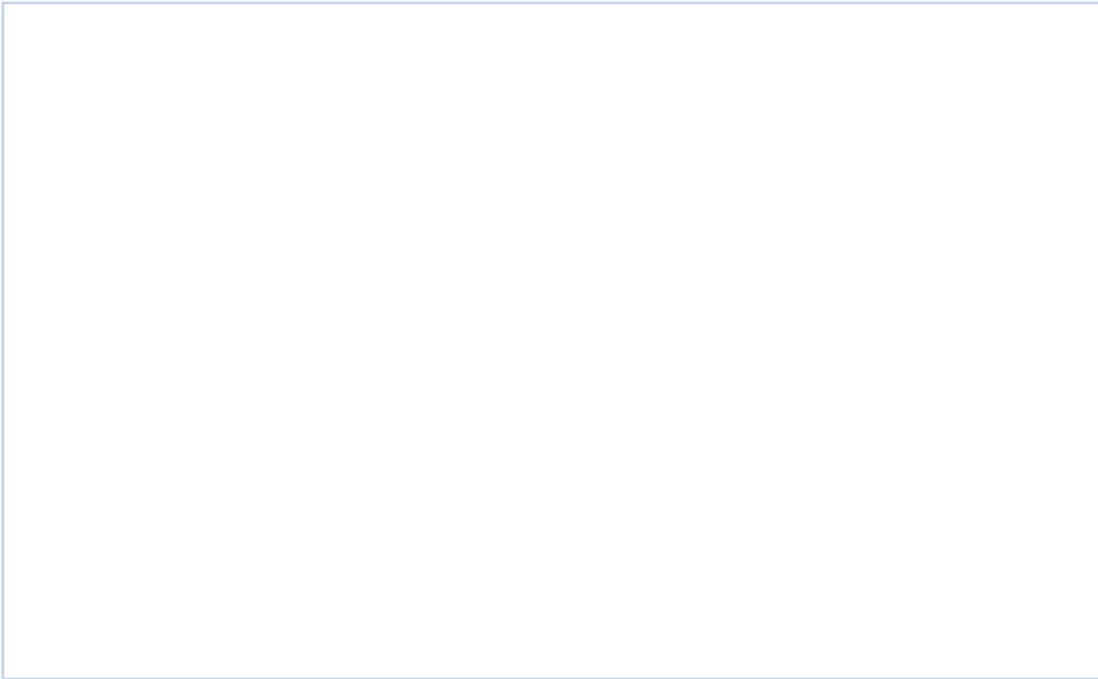
It is good to prepare and plan for the induction program ahead of time. A new employee that is introduced to an organisation in a welcoming and informative way will be more productive and confident in their job role than an employee who remains uncertain about important aspects of their job tasks and the organisation they are working for.

### Practice task 23

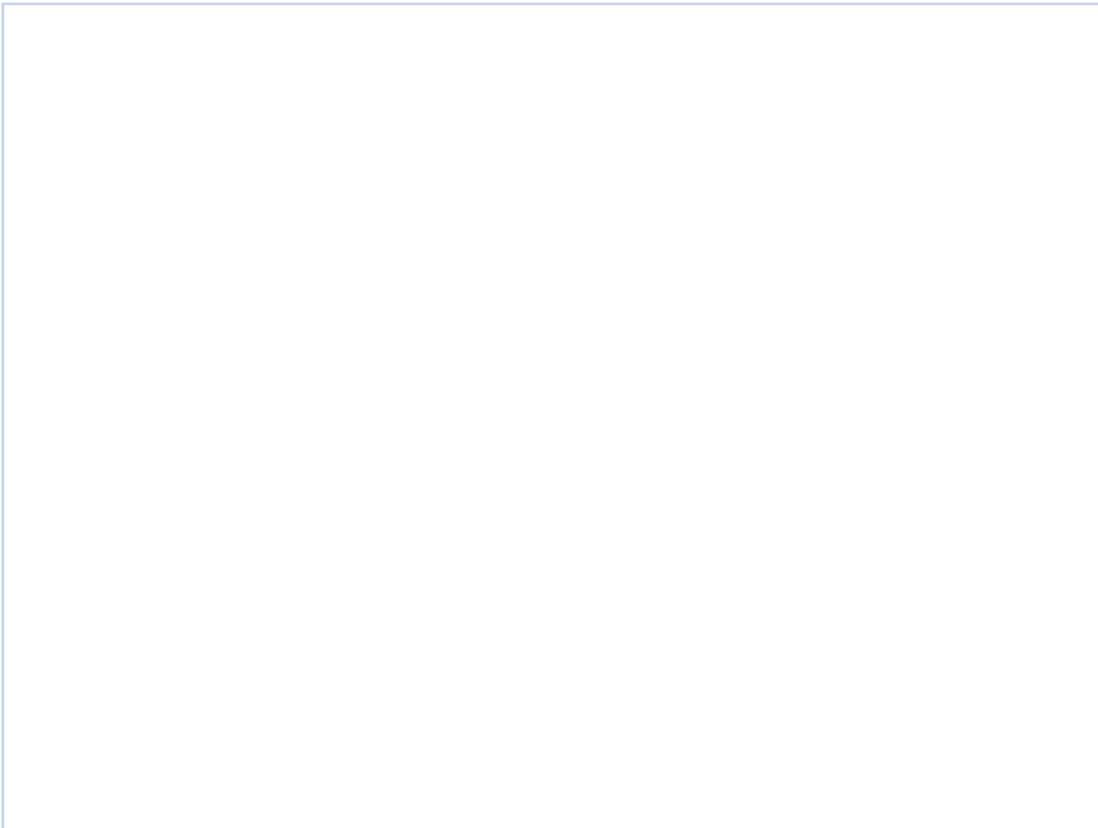
1. Write a checklist of documents and tasks that need to be completed before the new employee arrives for their first day.

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2. Write your own plan for an induction program. Base it on your current workplace or a workplace you are familiar with. Think about who you will involve in the induction process and what activities you will organise for your new employee. Present this by drawing up an induction checklist.



continued ...

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## Summary

1. Organise and provide a new employee with all the necessary employment documentation prior to their first day at work.
2. Ensure the new employee agrees with all the terms of the employment contract and signs it accordingly.
3. Write a checklist of all the tasks and documents that need to be completed for a new employee before induction begins, to make sure that all tasks are completed.
4. Inform relevant staff in your organisation about the appointment of a new employee and what day they will start work.
5. Introduce the new employee into your organisation by making them feel welcome and comfortable.
6. Organise an induction program that provides the new employee with the key information about the organisation and the job position, and ensure they have a clear understanding of what is expected of them.

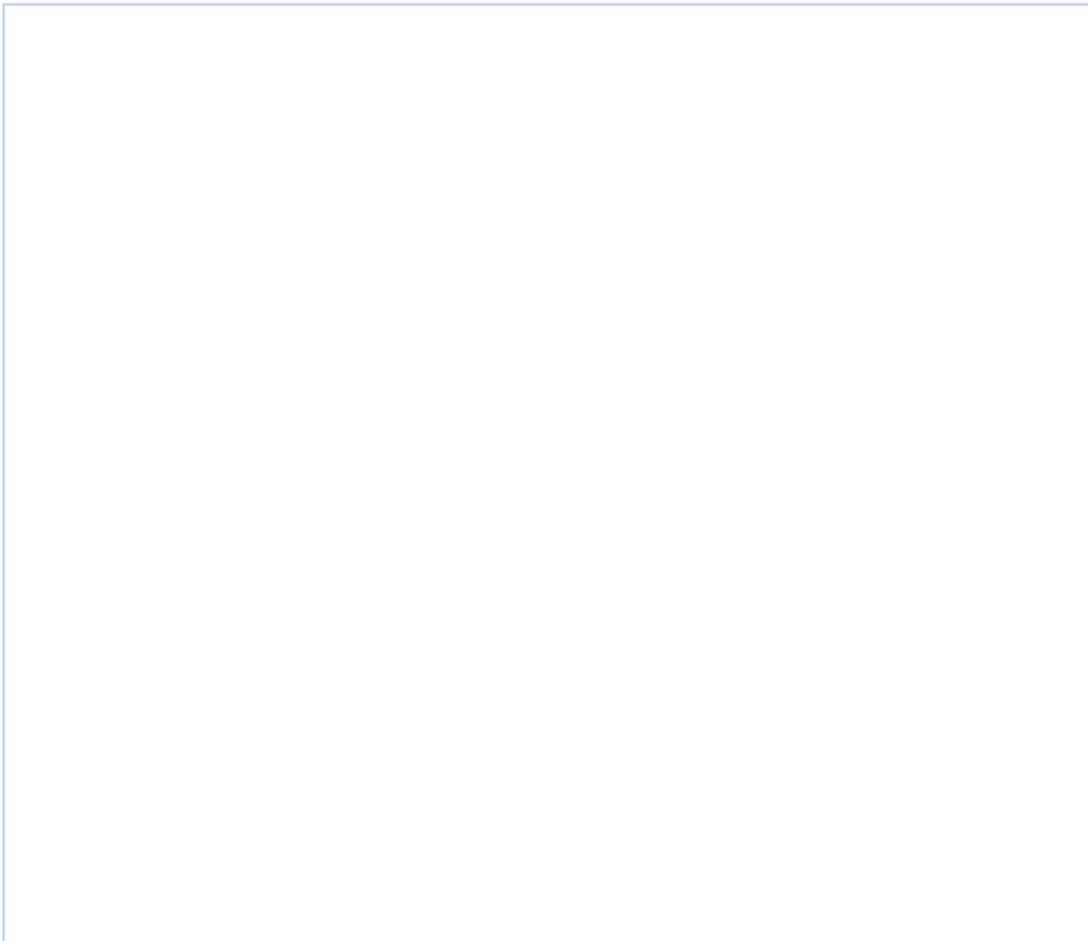
## Learning checkpoint 4 Induct the successful candidate

This learning checkpoint allows you to review your skills and knowledge in inducting the successful candidate.

### Part A

Write a half-page report on the induction process. Explain:

- what the induction process is
- how it relates to the recruitment and selection stages
- its purpose.



## Part B

Read the scenario, then complete the tasks that follow.

### Scenario

The head of the HR department of your company has informed you that a new assistant, Tom Finkley, will be joining the marketing department next week. She has asked you to do the following tasks before Friday. Note that the tasks are not necessarily listed in the order they need to be undertaken.

1. Contact Tom to welcome him and give him instructions for his first day at work.
2. Organise Tom's employment contract with the HR department. When it is ready, post it to Tom for him to review and sign.
3. Check with the HR department if there are any other documents that will need to be organised for Tom such as tax declaration and superannuation forms.
4. Develop a two-day induction program for Tom.
5. Contact relevant colleagues to request their involvement in the induction process.
6. Organise for the new appointment to be announced at the company meeting on Wednesday.
7. Email all employment documentation and Tom's CV to the marketing manager, John Coppolino, prior to induction.
8. Organise a workspace for Tom.
9. Contact the IT department to request that software program InDesign is installed on Tom's computer.
10. Check organisational policy for appropriate procedures for induction.

Decide on the order you will undertake the tasks. Fill out a timetable similar to the following, scheduling when you will complete each activity.

Schedule of induction preparation									
Day	09.00	10.00	11.00	12.00	13.00	14.00	15.00	16.00	17.00
Monday									
Tuesday									
Wednesday									
Thursday									
Friday									

